REYNOLDS-ALBERTA MUSEUM:

Destination Resort Plan

AUGUST, 1989

Alberta
TOURISM

91-06719/

Alberta
TOURISM

Office of the Deputy Minister

18th Floor, 10025 Jasper Avenue, Edmonton, Alberta, Canada T5J 3Z3 Telex 037-3651 403/427-4368

TO WHOM IT MAY CONCERN

The Government of Alberta recognizes that tourism is a major economic factor in the Province. Certain facilities developed by the Provincial Government have the potential to capitalize on the growth of tourism and function as a tourism generator. Such a facility is the Reynolds - Alberta Museum in Wetaskiwin.

The following consultant's report examines the tourism impacts of the development of the museum. This Tourism Destination Resort Plan reviews the impact and relationship of this tourism generator to local and regional tourism frameworks. The plan assesses existing tourism resources, potential tourism markets, regional requirements and opportunities, economic impacts and the potential roles of various participating sectors.

It should be noted that this study was conducted by an independent consultant commissioned by Alberta Tourism and does not represent government policy nor any commitment to implementation at this time.

If you have any comments relative to the report please forward them to:

Regional Planning Unit
Destination Planning Branch
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Additional copies of the report are available by contacting the above address, or by telephoning 427-2501.

Sincerely,

Bernard F. Campbell
Deputy Minister

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EXECUTIVE SUMMARY

A. EXECUTIVE SUMMARY

The Reynolds-Alberta Museum (R.A.M) is scheduled to open to visitors in 1992. It is expected to be a major impetus to the tourist trade in the Wetaskiwin area, the region and the Province. This tourism impact will in turn provide a sizable stimulus to the local and regional economy. As a result of the expected impact, the Department of Tourism commissioned IMC Consulting Group Inc. to investigate the tourism needs resulting from a major generator like the Reynolds-Alberta Museum. This assessment demonstrates the potential leverage factor for public investment in a provincial tourism generator for other local and regional development opportunities. It is also expected that the findings will generate interest in the local business community and municipal government authorities in support of the new tourism opportunities.

APPROACH

In preparing the assessment, four principle factors were analyzed to reach some conclusions in the form of development scenarios. Primarily, a region and series of areas to be influenced by the Museum were ascertained. Secondly, a detailed inventory of tourism assets and infrastructure that are presently available in the region was prepared. Thirdly, a market assessment of the anticipated visitation to the region was undertaken as a result of detailed research conducted for the City of Wetaskiwin[1]. Finally, an assessment of the economic impact was carried out, detailing the benefits accrued to the region as a result of the museum, tourism activity and other tourism related developments that are expected over and above the primary impacts of the museum development and operation.

Several factors were considered to help determine the generator's region of influence. Within this region, a series of areas and centres were also noted. It is anticipated that the City of Wetaskiwin (proper and immediate fringe area) will reap the greatest benefits, but the impact will be felt by four adjacent counties, surrounding smaller centres, certain communities on the major travel corridors leading into Wetaskiwin, and generally within a region bounded by approximately Highway 22 on the west side,

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[1] "Reynolds-Alberta Museum Economic and Market Impact Assessment"
IMC Consulting Group Inc., 1988-89 (On-going) - (City of Wetaskiwin, Alberta
In Partnership with the Canada/Alberta Tourism Agreement)

Highways 11 and 12 to the south, Highway 56 and Camrose to the east, and extending as far north as Edmonton, Highway 16, and Elk Island Park.

TOURISM INVENTORY

An inventory of all tourism assets and infrastructure was carried out and related to the projected market demand. It was evident that a number of key additional services and tourism facilities would be required, or the existing ones improved where appropriate. This would be necessary to serve the new tourists to the area, help get them to the area and keep them in Wetaskiwin and area for an extended period of time. The principle areas that were investigated included: accommodation, food and beverage establishments, meeting and reception facilities, recreational resources and attractions and community services and facilities. **The attached table indicates the present supply of services and facilities, and the anticipated tourist requirements as a result of the increased visitation to Wetaskiwin and area.** For the purpose of assessing future development opportunities and concerns, three aspects of the local infrastructure were also examined in detail: transportation patterns, municipal services and commercial land development areas.

Accommodation

As a result of the anticipated surge in overnight visitation, the present supply of both fixed-roof and nonfixed-roof accommodation will not serve the expected demand.

Although the entire region of influence does have over 2,000 hotel/motel rooms (over 3,500 if Red Deer is included), the quality is not sufficient to entice destination visitors to remain in the area overnight. With respect to the immediate area, Wetaskiwin is limited to 85 rooms of fixed-roof accommodation. Without improving the quality and the amount of establishments in Wetaskiwin and area, travellers will be inclined to "over night" in the larger centres of Edmonton, Calgary and Red Deer.

The region has a stock of over 3,500 campground sites for summer use. Although there exists a variety of both public and private camping facilities, it is estimated that the market will dictate a supply of more fully-serviced stalls, especially in close proximity to Wetaskiwin. Opportunities will be available for the existing campground

TOURISM INVENTORY AND REQUIREMENTS IN THE REGION

SUPPLY	SHORTFALL
1. **ACCOMMODATION (Fixed-roof)** - 2,000 (3,500+ if Red Deer included) hotel/motel units - Only 85 units in Wetaskiwin	- 200 units of fixed-roof accommodation in Wetaskiwin - Sensitivity to peak period demands (May - September) - Attractive accommodation units - Cabin/lodge units in close proximity to Wetaskiwin
2. **ACCOMMODATION (Nonfixed-roof)** - 3,500 campground sites for summer use - Private and public camping facilities	- 250 camp sites - Sites required in immediate Wetaskiwin area - Full service r.v. site - Theme parks for camping - Locations near prime water bodies - Upgrading of existing camping facilities
3. **FOOD & BEVERAGE/DINING ESTABLISHMENTS** - 35 food service establishments in Wetaskiwin (4/5 are considered fine dining, 15/16 family dining and 15 are fast food) - Limited special service or theme oriented dining and beverage facilites	- 50 additional fine dining restaurant seats - 150 additional family dining restaurant seats - Strong themes for marketing - Improved designs and decor to interest tourists to dine locally
4. **CONFERENCE/MEETING FACILITIES** - 3 halls, 2 restaurants with capacities for less than 300 each in Wetaskiwin - Complexes in surrounding communities with capacities for 250 or less	- Prime meeting facilities that can accommodate large gatherings in Wetaskiwin - Sensitivity to peak period demands - Centre to accommodate receptions, conferences and seminars for scope and size of a city such as Wetaskiwin
5. **RECREATIONAL RESOURCES/ATTRACTIONS** - Limited number of resorts and attractions in Wetaskiwin region	- Quality facilities with tourist services - Theme orientation to resorts - Attractions to increase local appeal - Water orientation of new developments
6. **TOURIST SERVICES/PRODUCTS** - Mainly concentrated in larger centres such as Wetaskiwin and Camrose	- Several businesses that will attract the interest of tourists and supply their travel needs - Specialized products and services - Recreation and amusement especially in Wetaskiwin and area - Nightclubs

owners and operators to offer campers a full range of tent, trailer and recreational vehicle facilities. Campgrounds, especially in the immediate Wetaskiwin area that contain water, sewer and electrical hook-ups are very limited. Furthermore, most existing facilities do not provide an "attraction" component to their development. New developments should therefore consider locating adjacent to prime water bodies and existing facilities should be considered for upgrading to improve their appeal. The development of these facilities should in turn discourage leakage into the more popular camping locations outside the region.

Other forms of fixed-roof accommodation that are presently limited in supply and that may provide sound business opportunities in the Wetaskiwin area are lodges, chalets or cabins and vacation farms with bed and breakfast facilities.

Food and Beverage/Dining Establishments

The increase in both day and extended-stay visitors to the area will have a dramatic impact on food and beverage facilities. Although Wetaskiwin has 35 food service establishments at present, approximately 30 are only fast food and family dining spots. The quality of the overall stock should be improved to cater to visitors from outside Wetaskiwin. Opportunities are also available to develop fine dining, special service or theme oriented dining and beverage facilities in the City and to a degree in nearby centres such as Millet or Ponoka where the travelling public will create its own in-flow market.

Conference Facilities

The Wetaskiwin area is presently limited in its ability to accommodate large gatherings. Reception events, conferences, or seminars are restricted to three community halls and two restaurants, each of which are heavily booked during peak periods of the year. Surrounding rural area communities also provide some complexes but all have a maximum capacity of 250 people or less. Therefore, opportunities exist in Wetaskiwin for improved conference and meeting facilities. Such facilities could be included as part of other tourist developments or on their own. Wetaskiwin should also investigate the option of developing a new convention centre complex in the near future. This option could be in keeping with the City's future redevelopment plans at the hospital site or in other downtown locations.

Recreational Resources

The region has a limited amount of developed recreational resources such as resorts. However, potential for this form of recreational tourism development appears to be extensive and could focus on water or land based recreation. Out of the 18 recreational water bodies in the region, at least six freshwater lakes have potential for intensive water-oriented development. Other opportunities that may be land based should focus on some of the natural amenities outside the urban centres. Any new resort proposals should also consider both outdoor and indoor recreation to provide year-round appeal. The "attraction" component of such recreational development should be emphasized.

Business and Service Facilities

The anticipated visitation will also influence the local business services and facilities. Typical tourist demand will dictate that the business community provide certain products and services that are presently not available. Besides the various retail items such as gift, novelty and souvenirs, photographic, specialty foods, books and clothing, certain services ranging from tourist information to auto, r.v. and bus repair will have to be added or enhanced.

Development Infrastructure

The analysis of the infrastructure included reviewing transportation and traffic patterns on roadways to Wetaskiwin, the municipal services pertinent to Wetaskiwin's growth and the commercial development areas that could possibly accommodate new growth. With respect to transportation, it was found that three roadway systems will receive the greatest impact: Highways 2, 2A and 13. Other regional roadways of significance to the Wetaskiwin area are: Highways 11, 21, 14, 12(20), 53, 56, 39, 22 and 60. Each will accommodate flow from various points and directions in the province and will obviously experience increases in volumes during peak visitation periods. The more popular routes and sections of roadways should be monitored for both opportunities and any possible transportation problems.

The City of Wetaskiwin is now faced with some serious options to growth. The siting of the Reynolds-Alberta Museum (approximately 1 kilometer outside the City's boundary), means that municipal servicing will have to be extended beyond its present system. As such, an opportunity exists to service several hundred hectares of land to the south and west of the city limits. Sanitary sewer, water and highway improvements (to Highway 13) are required to service the museum. The expanded capacity could help bring on stream new residential, commercial and industrial property. This servicing option carries a price tag of over $11 million, but it is the City's intent to also address the present system that is operating at or above its design capacity. With proper planning and phased development, the site servicing can be maximized over several years.

A final component of the infrastructure for new development is the commercial area. It is anticipated that the commercial districts of Wetaskiwin and to some degree those in surrounding communities will contain the bulk of commercial service and retail areas that will cater to the needs of the visitors. There are at least three main areas in Wetaskiwin, two of which could attract highway commercial business and the other could attract businesses and land uses that do not require traffic exposure along valuable highway property and that are more pedestrian oriented. Certain commercial or recreational ventures that require extensive land areas, exposure, or amenities such as natural land features, could occur outside the urban centres in the region, along some of the main arterials and in natural areas outside of Wetaskiwin.

MARKET ASSESSMENT

The anticipated annual visitation for the museum has been forecast at 250,000 by Alberta Culture and Multiculturalism. IMC is of the opinion that this forecast may be somewhat conservative and that the annual visitation will reach 300,000 for the first two years of the museum's operation. Several factors including the results experienced at other major attractions in Alberta, the proximity of the museum to Edmonton, and assuming that there is an aggressive marketing campaign for the museum, supports this conclusion.

It is expected that the visitor profile for the Reynolds-Alberta Museum will be similar to profiles for other major attractions located in Canada and the U.S. The visitor origins and demographic information should be noted by the business community to allow for effective planning and consideration of serving the new tourists to the area. For example, it is important to note that over 50% of the visitors will be from outside of Alberta, while another 45% could be from beyond a 50 kilometer radius from Wetaskiwin. This indicates that a substantial portion of the market could be targeted for overnight visitation. The average hotel/motel patron is estimated to spend approximately $50.00 - 75.00 per day in the area; however, without more added tourism appeal to the area, and more suitable accommodation nearby, only 20% of visitors are expected to become hotel patrons.

The anticipated market for the Reynolds-Alberta Museum will generate a demand for additional fixed-roof accommodation, as well as a myriad of tourist related goods and services. It is estimated that approximately 200 additional hotel/motel rooms/units will be required in the immediate area to handle the forecast demand. Camper nights are also expected to increase so that an anticipated 250 new camp sites will be required, especially in the immediate Wetaskiwin area. Finally, it is anticipated that a minimum of 50 fine dining and 150 family dining restaurant seats need to be added to Wetaskiwin to accommodate increased dining demand. Proportionate increases in the demand for other tourist related retail items and services will generate a need for quality shopping directed at a new consumer market for the area.

ECONOMIC IMPACTS

The local regional economy of Wetaskiwin and its immediate surrounding area will experience positive economic impacts associated with the construction and operation of the museum, as well as the incremental tourist activity and the commercial and retail development which will occur in the area resulting from the operation of the museum. The development impacts are estimated to generate approximately $20 million of gross output and 310 person-years of employment during the museum construction period of 1989 to 1992 and for several years beyond during which some additional commercial development will occur. The on-going economic impacts are estimated to total $6.7 million of gross output and 110 person-years of employment annually. This includes the impact of the operation of the museum and the incremental tourist activity in the study area. These impacts will be generated upon commencement of museum operations.

CONCLUSIONS AND FUTURE DEVELOPMENT SCENARIOS

The preceeding assessments allow us to conclude that the Reynolds-Alberta Museum, over the long term, will have a net positive impact on Wetaskiwin, the surrounding region and the province. The direct impact however, will accrue mainly to Wetaskiwin and a surrounding area of approximately 50 kilometers. Those communities, operators and businesses within this area will receive a degree of impact which is dependant on several factors. Their ability to capitalize on the new market will however, require effective marketing. If Wetaskiwin and area communities cannot meet the demands of this new market, the positive impact will be minimized and the benefits lost to other centres such as Edmonton

The increase in projected visitation to this region suggests that certain new services and facilities will be required for the tourists. These services and facilities can be categorized as follows:

- **Accommodation**
- **Retail and Service**
- **Attractions**

- The **accommodation** should be in the form of both fixed-roof and nonfixed-roof types.

- The **retail and services** should include food and beverage establishments, specialty retail and service and a variety of other businesses to meet the demands of the new market.

- The **attractions** are required to keep visitors in the area for an extended period of time beyond the nominal three to four hours of museum visitation. These attractions can take many forms, ranging from a major resort complex to a golf course to a convention facility or "events" grounds.

Based on the assessments, and the need for the above-noted services and facilities, four development scenarios were considered for Wetaskiwin and area. Each contains elements in support of anticipated market demand and considers the impact of the museum. Each has benefits and disadvantages associated with components of the scenarios. The four scenarios are as follows:

1. **Major resort complex located west of Wetaskiwin**
2. **Major resort complex located to the east or north of Wetaskiwin**
3. **Tourism services located throughout Wetaskiwin and surrounding region.**
4. **Clustering of services and attractions.**

The above-noted scenarios were prepared using several criteria, including:

- City and area attributes
- land use planning implications
- strategic market positioning
- linkages to existing developments
- servicing requirements
- site suitability

Each scenario may, however, lend itself more to certain criteria than the others. For example, **scenario number 1** reflects a strong orientation to the Museum complex and the new municipal servicing provisions. **Scenario number 2** reflects potential linkages to existing and proposed recreational areas such as the golf course and it addresses the need to help distribute the visitation throughout the community. **Scenario number 3** reflects all of the criteria to a degree but is heavily dependant on market requirements and positioning. **Scenario number 4** reflects an orientation to the Museum Complex but also promotes linkages of various clusters of land uses throughout the City. (See attached Figures).

For the first scenario to be optimized, all development must take advantage of the proposed new servicing infrastructure. The merits of this option are the proximity to the Museum and the possible linkages with a major market generator. A concentrated approach of a resort complex could conceivably entail quality accommodation, recreation, an added attraction, retail and fine dining and all convention facilities located in the vicinity of the museum site area along Highway 13. This option would certainly have an impact on the remainder of the Wetaskiwin business community. It is also conceivable that such a project could be another "draw" for Wetaskiwin.

The second scenario assumes that with sound planning, site investigation and marketing, the impact of visitation can be strategically distributed throughout the business community. This can only be accomplished if an additional attraction or service (forming part of a resort complex) will encourage the movement of the R.A.M. visitors beyond the initial destination. The merits of this option also include the possible use of more suitable sites in Wetaskiwin. The main drawback of this option is that it does not help mitigate the servicing costs on the southwest corner of the city.

Scenario number three (or a variation of the same) is dependant on several entrepreneurs with different interests and possibly some civic investment which could be in the form of the city's land disposition. This option addresses some of the city's interests as well as it presupposes that it is in the developer's best interest to locate new facilities and services at locations where linkages and market requirements can be maximized. Therefore, in this scenario, tourism services and facilities are proposed to be strategically located throughout Wetaskiwin and the surrounding region. Although this option lacks the concentrated effort of a full service resort complex, with proper support and encouragement, benefit could accrue to several organizations, businessmen, the City and the County. This scenario also lends itself to the existing business community taking advantage of opportunities to expand or enhance their present operations.

Scenario number four promotes the clustering of several tourist services and attractions on the west side of the city near the Museum. Two clusters, one south of Highway 13 and another to the north and west of the Museum site, are suggested. In order for these two components of the cluster concept to have full impact on the community, linkages with other community developments are necessary. This option lends itself to several private and civic development opportunities in Wetaskiwin.

INTRODUCTION

B. INTRODUCTION

The following assessment provides an overview of several aspects associated with the anticipated impact of the Reynolds-Alberta Museum (R.A.M.) being developed at Wetaskiwin. Like many other major attractions in Alberta, R.A.M. is expected to cause a surge in annual visitation to a community and surrounding region that have never experienced significant tourism impact before. This will mean that communities, tourism operators, and businesses must be prepared if they wish to maximize the benefits and plan to avoid any drawbacks.

The assessment was commissioned by the Department of Alberta Tourism to investigate the tourism needs of the major tourism generator scheduled to open in 1992. It was also hoped that this study could demonstrate the potential leverage factor for public investment in the museum for other local and regional development opportunities and generate interest in the local business community.

The study looks at four principle factors and culminates with three development options to support tourism in Wetaskiwin and area. The first exercise entails establishing a geographic region (and areas) of influence that in turn relates to the other factors. Secondly, the region is inventoried for its tourism assets and infrastructure in order to determine the availability of several services and facilities normally required by tourists. The inventory considers accommodation, food and beverage establishments, meeting and reception facilities, recreational areas and other community services and facilities, including attractions and specialty retail. Municipal infrastructure is also investigated to determine land development opportunities and issues. Thirdly, the anticipated Museum visitation market is assessed to provide an estimate of demands. Lastly, an assessment of the economic benefits is undertaken, detailing the benefits accrued to the region as a result of the museum, tourism activity and other tourism related developments.

The development options or scenarios take into consideration the anticipated market demand and the community requirements to maximize the impact of the Reynolds-Alberta Museum. They attempt to address some of the many tourist service voids in Wetaskiwin and area. Recommendations for implementation of accommodation, special retail and any new attractions are presented briefly. A follow-up study presently being conducted for the City of Wetaskiwin by IMC Consulting Group Inc. will provide a detailed marketing strategy and recommended measures required to have the City and private sector see development through to fruition.

REGION OF INFLUENCE

1.0 REGION OF INFLUENCE

As a preliminary exercise in establishing the importance of the new tourism generator, to be known as the "Reynolds-Alberta Museum (R.A.M.)," it is imperative that a geographic area of influence or impact be defined. It is this area or series of regions emanating from the generator, that will reap the benefits of the $30 million project and service its projected attendance of over 250,000 per annum over at least the first two years of operation[1]. Considering that R.A.M. will be of a magnitude and scope similar to some of the more popular historical facilities in North America, the impact generated should result in benefits to a large geographic area. It is expected that with strategic planning, development and marketing, the City of Wetaskiwin and greater region will be able to experience more benefits and avoid the drawbacks. The amount of economic and tourism impact accrued to the region, and the extent of the regional influence, however, will depend on a number of factors, including the following:

- **location of the generator**
- **travel patterns**
- **service centres**
- **drawing power of local attractions**
- **visitor profile**
- **regional development opportunities**

These factors will in turn influence the expenditure patterns of tourists and their length of stay in the area.

Each of these factors have been assessed and discussed in the following six (6) sub-sections. (The purpose of this discussion is solely to help define the region; elaboration on some of these factors will be presented in later sections of this report). The assessment concentrated on a region that is depicted on the map following this page. From this assessment resulted a defined "region of influence". The impact of the museum within this region of influence is expected largely in Wetaskiwin and immediate area, in the adjacent counties of Wetaskiwin, Leduc, Ponoka and Camrose, and the surrounding centres of Millet, Camrose, Leduc and Ponoka.

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[1] Estimate provided by Alberta Culture and Multiculturalism, February, 1989.

1.1 LOCATION

Wetaskiwin is located in the west-central portion of the Battle River Tourist Zone along Highway 2A. The City has a stable economy as its location allows it to draw on many smaller, agricultural service centres in the central region of the province.

In the past, Wetaskiwin has not been a significant tourist destination, except for those residents of the surrounding towns and hamlets, including the Indian Reserves to the South.

The surrounding County of Wetaskiwin (#10) provides the area with a substantial amount of outdoor recreational opportunities and support. The majority of these opportunities exist near the water bodies; lakes and river systems are located to the east and west of the city. Important water bodies are also located to the south in the County of Ponoka (#3) and to the north and northwest in the County of Leduc (#25).

The R.A.M. site is a quarter section of land located just west of the present city limits of Wetaskiwin along Highway 13. Around the quarter section occurs the following land uses:

To the South, Highway 13 and to the south of Highway 13 the County of Wetaskiwin Administration Building, a church, an extensive area of raw land and some agricultural (cultivated) lands.

To the East, a government road allowance along the total western boundary. This government road allowance has a road access to Highway 13 providing access to the R.A.M. site. Beyond the road allowance and between the city boundary is farmland where little development has occurred.

To the West, no development has occurred on the existing farmland which stretches many miles to the west.

To the North, an existing runway to the airport is located along the corner of the site at approximately 45^{o} to the property line. North of the runway are a series of existing airport buildings.
(Refer to Figure 1 and the R.A.M. Site Plan in Appendix 1)

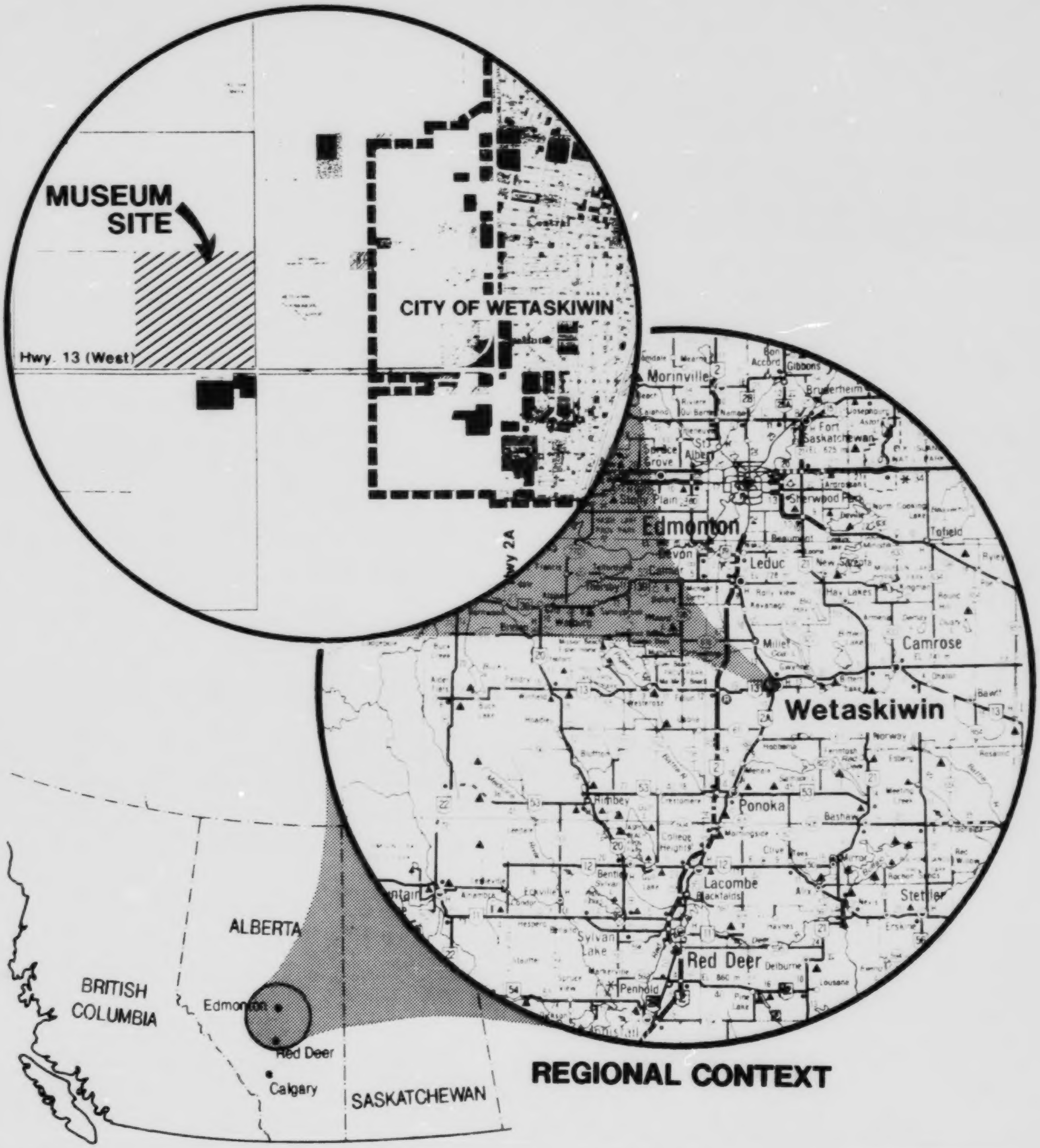

MUSEUM SITE
CITY OF WETASKIWIN
Hwy. 13 (West)
Hwy 2A
Morinville
Gibbons
Bruderheim
Fort Saskatchewan
St. Albert
Spruce Grove
Stony Plain
Sherwood Park
Edmonton
Devon
Leduc
New Sarepta
Tofield
Hay Lakes
Millet
Camrose
Wetaskiwin
Ponoka
Rimbey
Bashaw
Lacombe
Blackfalds
Stettler
Sylvan Lake
Red Deer
Penhold
Delburne
REGIONAL CONTEXT
ALBERTA
BRITISH COLUMBIA
Edmonton
Red Deer
Calgary
SASKATCHEWAN

Figure 1

LOCATION OF MUSEUM SITE IN REGIONAL CONTEXT

R.A.M. can be accessed in the region by taking the following possible routes:

- From the North (i.e. Edmonton)
    - Highway 2A (south of Leduc)
    - or - Highway 2 to Highway 13 East

- From the South (i.e. Red Deer/Calgary)
    - Highway 2A (north of Lacombe)
    - or - Highway 2 to Highway 53 East to Ponoka and north on 2A
    - or - Highway 2 to Highway 13 East

- From the East (i.e. Camrose)
    - Highway 13

- From the West
    - Highway 13 from Highway 2

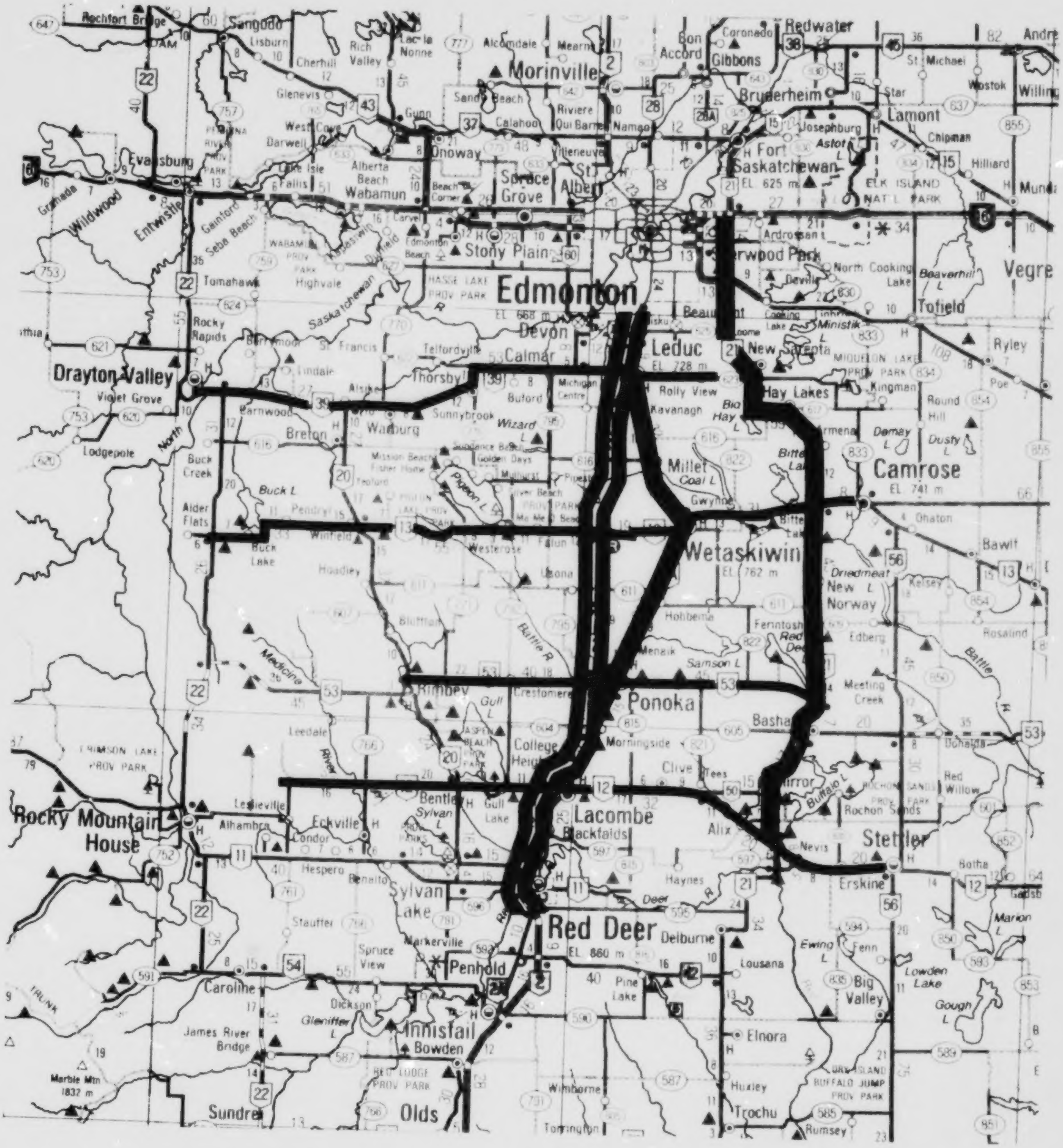
1.2 TRANSPORTATION PATTERNS

Of significant importance in delineating an area of influence for a tourism generator is the regional transportation system and patterns. The transportation system will determine linkages with other centres and attractions in the area, which, in turn, influence tourists' propensity to travel beyond the original destination.

The R.A.M. at Wetaskiwin is conveniently located along two major routes: Highway 2A and Highway 13. Connected to these primary highways are roadways that extend into the rural area and other service centres. (See Figure 2).

The following is an overview of the transportation pattern in the area:
(See Appendix 2 for Traffic Volumes on selected Routes).

1.	Highway 2	- carries the highest volume of traffic - links Edmonton, Red Deer and Calgary to Highway 2A and eventually Wetaskiwin - links several east-west routes
2.	Highway 2A	- carries a substantial amount of traffic between Leduc and Ponoka (and Lacombe) - connects Wetaskiwin to Millet, Kavanagh, Hobbema and Ponoka - serves as an alternate route to Highway 2.
3.	Highway 13	- carries a significant amount of traffic between Camrose and Highway 2. - allows traffic flow from points east and into Saskatchewan - allows for connections to natural areas, water bodies and rural communities to the east and west of Wetaskiwin - allows for access to two major attractions: Pigeon Lake and Buck Lake and associated recreational areas and parks. - allows for direct access off Highway 2, just north of the Bearhills/Westaskiwin rest area on Highway 2.
4.	Highway 21	- provides an excellent north-south route linking several communities and attractions between Ft. Saskatchewan on the north side and Highway 12 to the south. - provides the eastern arm for a circle tour around Wetaskiwin - provides access to the outdoor recreational areas on the east side of Edmonton, i.e., Cooking Lake, Elk Island, Blackfoot Reserve and Beaverhill Lake Birding Complex.


Edmonton
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Sylvan Lake
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Bowden
Delburne
Elnora
Big Valley
Caroline
Sundre
Olds
Trochu
Huxley
Rumsey
Evansburg
Entwistle
Wildwood
Lodgepole
Buck Lake
Alder Flats
Wabamun
Onoway
Elk Island Nat'l Park
Pigeon L.
Buffalo L.
Gull L.
Sylvan L.
Battle R.
Red Deer R.
Medicine R.

▬ **PROVINCIAL CORRIDOR**

▬ **PRIMARY ROADWAY**

▬ **REGIONAL ROADWAY**

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Figure 2

TRANSPORTATION PATTERNS

5. Highway 12
- another east-west route connecting Highway 2.
- allows for traffic flow from points east, such as Stettler, Castor and Coronation and into Saskatchewan.
- provides an excellent arm of a circle tour connecting attractions and communities such as Gull Lake (Aspen Beach Provincial Park, Rimbey, Buck Lake area, Lacombe, etc.).

6. Other Routes
- Highway 53 - Rimbey to Highway 21
- Highway 60 - Highway 16 to Highway 39 south of Devon
- Highway 22 - Highway 15 (at Entwistle) to Rocky Mountain House
- Highway 39 - Drayton Valley to Leduc

Each of these routes (and other secondary highways) also contribute to the overall transportation network in the region. As such, they allow for convenient access to the attractions, outdoors and local service centres around Wetaskiwin.

7. Air and Rail Transportation
- access via Highway 2 to the Edmonton International Airport is within a 30 minute drive.
- small municipal airports are located at Wetaskiwin, Camrose, Stettler, Cooking Lake and other smaller communities to the east.
- rail (C.P.) main line runs through Wetaskiwin coming out of Edmonton and south to Calgary (no passenger service at present).

1.3 SERVICE CENTRES

Several service centres are located throughout the Wetaskiwin region. Wetaskiwin itself is one of the prominent centres with one of the largest municipal populations (10,103) south of Leduc. The City of Camrose (Pop. 12,571) acts as another major service centre to the surrounding rural area and small communities. The smaller towns, villages and hamlets serve more limited trading areas. The extent of visitor services and type or amount of local attractions in each of these centres seems to be related to the community's size and location (See Appendix 3). The larger the community, the more strategically located it is on a transportation route or the more distant it is from a regional service centre, the greater the services available. Since the area does not have many developed destination tourist attractions, tourism services, including fixed-roof accommodation, auto service and special retail, therefore appear to be restricted to the larger centres.

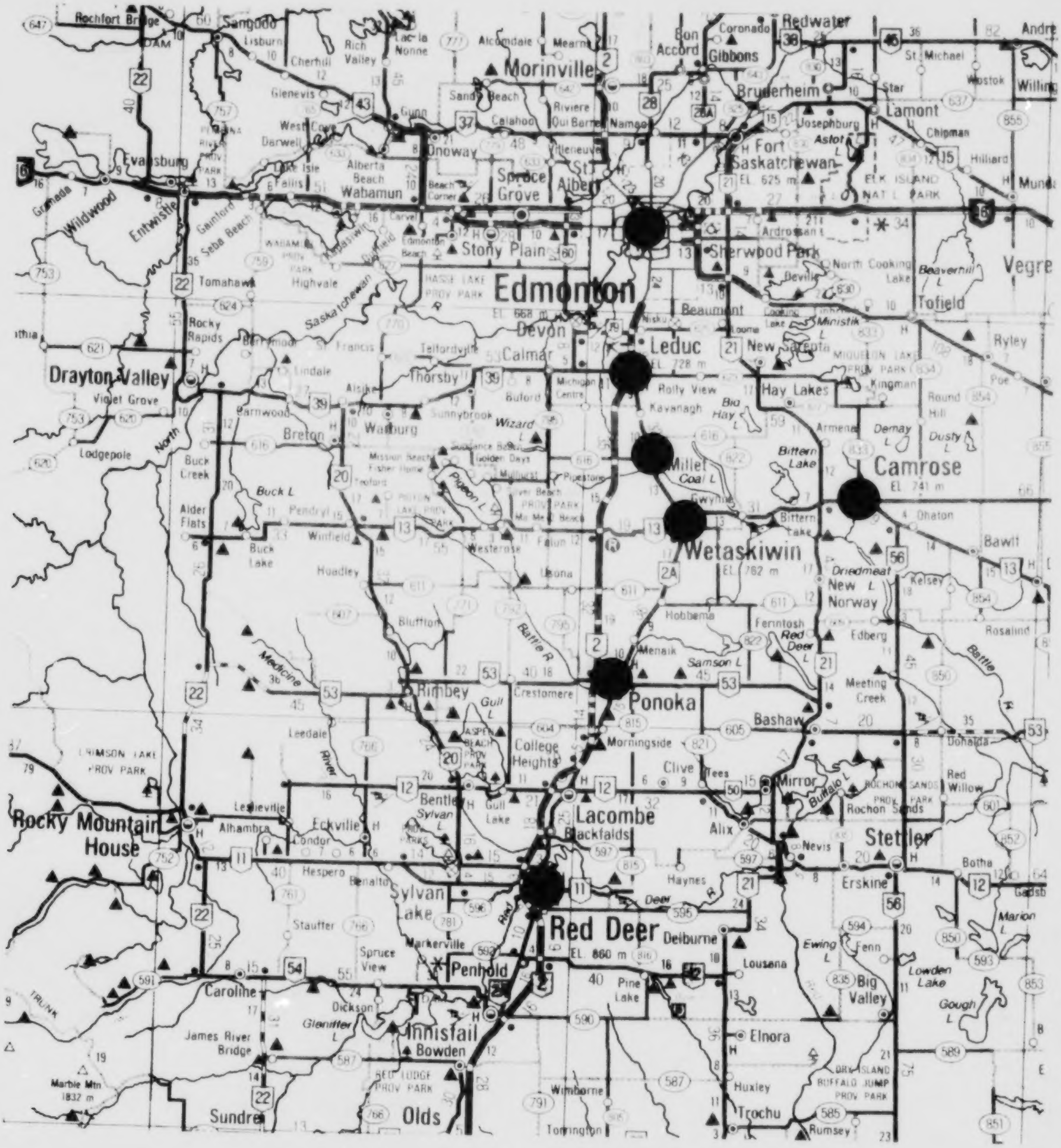
Attractions and non-fixed roof accommodation in the area are spread throughout the rural parts of three counties:

Wetaskiwin (#10)
Leduc (#25)
Ponoka (#3)

and in various communities located along the primary and secondary highways. (See Figure 3).

The following is an overview of the centres expected to serve the R.A.M. visitors with required tourism services and infrastructure, by market area (in order of priority).

Market Area	Service Centre/Area
Regional (Including Edmonton)	1. Wetaskiwin 2. Millet 3. Leduc 4. Edmonton 5. Provincial Camp Grounds in nearby parks and private camping facilities. (County of Wetaskiwin #10, County of Leduc #25)


Edmonton
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Wetaskiwin
Camrose
Ponoka
Lacombe
Red Deer
Morinville
Redwater
Gibbons
Bruderheim
Lamont
Fort Saskatchewan
Sherwood Park
St Albert
Spruce Grove
Stony Plain
Wabamun
Evansburg
Entwistle
Drayton Valley
Devon
Calmar
Beaumont
Thorsby
Breton
Warburg
Tofield
New Sarepta
Hay Lakes
Hobbema
Bashaw
Rimbey
Bentley
Eckville
Rocky Mountain House
Sylvan Lake
Blackfalds
Clive
Alix
Mirror
Stettler
Delburne
Penhold
Innisfail
Bowden
Olds
Sundre
Caroline
Big Valley
Elnora
Trochu
Huxley
Erskine
New Norway
Edberg
Meeting Creek
Ohaton
Bawlf

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Figure 3
PRIME SERVICE CENTRES

	6. Other centres on route.
Northern Alberta	1. Edmonton 2. Wetaskiwin 3. Greater Edmonton 4. Provincial Camp Grounds in nearby parks, private facilities, or in other Edmonton locations 5. Camrose 6. Leduc 7. Points south on routes to other destinations
Southern Alberta	1. Edmonton 2. Wetaskiwin 3. Red Deer 4. Provincial Camp Grounds in nearby parks, private facilities, or in those between Red Deer and Wetaskiwin 5. Ponoka
Western Canadian Provinces	1. Edmonton 2. Wetaskiwin 3. Camrose 4. Red Deer 5. Leduc (air travellers)
Other Canadian Provinces	1. Edmonton 2. Wetaskiwin 3. Nearby Parks 4. Leduc (air travellers)
International	1. Edmonton 2. Wetaskiwin 3. Leduc (air travellers)

The above-noted markets will tend to be serviced by these centres and areas as a result of being able to provide:

- fixed-roof accommodation - hotel/motel (bed and breakfast, rental cabins);
- nonfixed-roof accommodation - camp sites, r.v. parks - full service sites;
- special retail - crafts, souvenirs, etc.;
- service - auto, outdoor supplies, r.v., bicycle, etc.;
- other attractions and amusements;
- other recreation; and
- rentals

Competitive forces will also dictate how well the respective lesser centres can draw the visitors away from the primary centres of especially Wetaskiwin and Edmonton. For example, major events, new and additional attractions and the natural appeal of the land features of the area will provide incentives for tourist movement in the region.

(More detailed descriptions of services provided by the local and regional centres will be presented in Section 2 of this report).

1.4 ATTRACTIONS

Another important factor in defining the R.A.M.'s region of influence is the list of attractions comprising of events, historical sites, natural features and tourist facilities such as museums and other man-made attractions. Again, it is evident that the majority of attractions are located in the regional and local service centres, with the exception of the natural features which are associated with the provincial parks, camp grounds and other recreational areas.

A close investigation of documented materials such as the Battle River Tourist Destination Area Study (TDA), the Battle River County Marketing Plan and community information gathered from various Community Tourism Action Plans indicates the following priority attractions:

1. Reynolds - Alberta Museum (opens 1992)
2. Lakes, e.g., Pigeon, Buck, Wizard, Telford, Buffalo, Gull, etc.
3. Recreational Areas - golf courses, ski hills, hiking trails
4. Parks - provincial, county, private
5. Wilderness areas, wildlife scenery
6. Special events - cultural, sports and agricultural (includes native Indian history)
7. Museums/historical sites
8. Leduc Oil Well #1 (limited development to date)
9. Guest ranches/country vacations
10. Edmonton Capital City Raceway Park (Edmonton International Airport) (proposed)
11. Other specialized facilities such as Polar Park, etc.

With respect to the events at the community level, the majority are of only local significance, being primarily agricultural or sports related. Regional and provincial class events comprise less than a quarter of the events and are mainly sports oriented and cater to a select market and participant.

Of all the (other than events) tourist attractions in Battle River Country, 77% are man-made (eg., Polar Park, museums, etc.) and 23% are natural (eg., North Saskatchewan River, lakes, etc.) (Battle River T.D.A., 1983). Again, many of the attractions that are capable of drawing significant visitation are located within or in close proximity to the major urban centres such as Edmonton, Wetaskiwin, Camrose and Ponoka. Other tourist recreation facilities are located in association with the natural resources of the region. These facilities are also heavily concentrated near urban centres, along regional travel corridors, around lakes, within river valleys and within certain physiographic units within moderate to high capabilities for outdoor recreation.

(Figure 4 depicts some of the prominent locations of the regional attractions. Other than R.A.M. at Wetaskiwin, there is presently a void of developed major attractions that draw from outside the region. Outdoor recreation near lakes and natural areas and local events provide a substantial tourist draw for the area.)

1.5 MARKET DEMAND

As was noted earlier, visitor profiles for the facility can only be extrapolated and forecasted accordingly to assess market demand. Nevertheless, information and forecast factors can be drawn from experiences with other museums in North America and from general visitor needs.

The forecast annual visitation by Alberta Culture and Multiculturalism is 250,000 in the first two years of operation. IMC's prediction is for closer to 300,000 as a result of investigating numerous factors, and assuming an aggressive marketing campaign to be launched by the City of Wetaskiwin. This prediction can be equated to the 1988 visitation for Tyrrell far exceeding the original projection of 300,000. Over half a million people from various markets visited Tyrrell in Drumheller last year, with over 50% from outside Alberta and 18% from the international market.

The following selected statistics are of particular relevance to this exercise. Although they relate specifically to the Tyrrell case, the market intelligence can be used to determine market needs and therefore areas of influence for R.A.M.

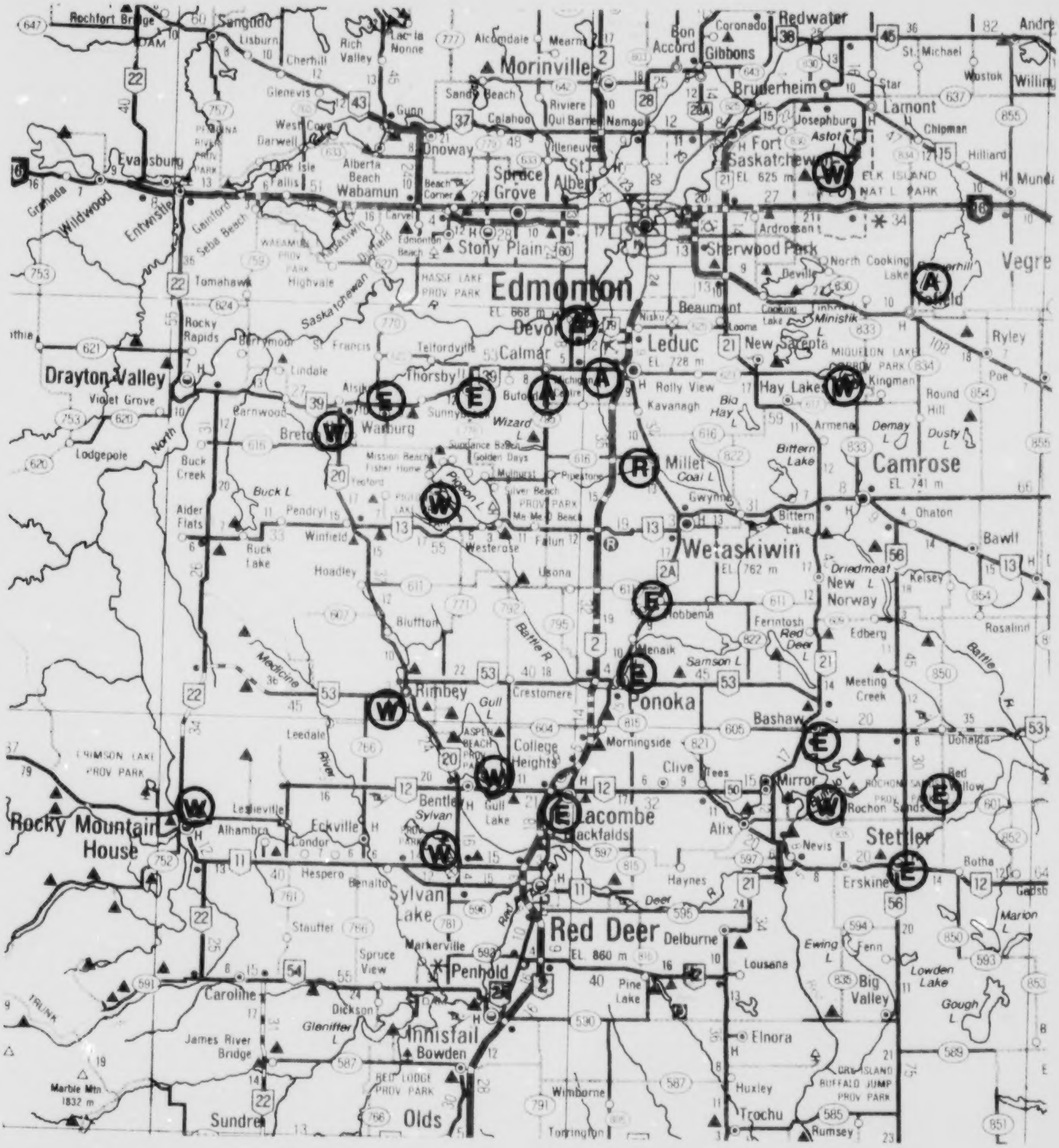
June-July 1988 Visitor Survey at Tyrrell

1. Origin

- Alberta	50.2%
- Other Province	32.0%
- Other Country	18.2%

2. Age

- Less than 12 years	23.2%
- 13 to 19 Years	7.8%
- 20 to 34 Years	22.0%
- 35 to 49 Years	23.0%
- 50 to 64 Years	13.0%
- 65 + Years	11.5%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Gibbons
Redwater
Bruderheim
Lamont
Tofield
New Sarepta
Hay Lakes
Blackfalds
Bentley
Eckville
Delburne
Bowden
ELK ISLAND NAT. L. PARK
MIQUELON LAKE PROV. PARK
CRIMSON LAKE PROV. PARK
RED LODGE PROV. PARK
DRY ISLAND BUFFALO JUMP PROV. PARK
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Ⓐ EXISTING & PROPOSED ATTRACTIONS

Ⓦ OUTDOOR RECREATION AREA (Water Bodies)

Ⓔ SPECIAL EVENTS (Cultural Activities)

Ⓡ GUEST RANCH AREA

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Figure 4

REGIONAL ATTRACTIONS

3. Principle Reason to be in the Area

- To visit museum	49.0%
- Vacation	31.0%
- Family Reunion	8.0%
- Meetings/Conferences	2.2%
- Other	10.0%

4. Extent of Stay in Local Area

- 1 Day (not overnight)	39.0%
- 0.5 Day	27.0%
- 2 Days	22.0%
- Over 3 Days	7.0%
- 3 Days	5.6%

5. Number of members in household/group visiting museum

- 1	4.3%
- 2	23.1%
- 3	17.8%
- 4	22.7%
- 5	15.3%
- 5+	16.8%

6. Duration of Museum visit

- 1.5 Hours	10.6%
- 1.5 to 3 Hours	63.8%
- 3 + Hours	26.0%

(Mode of transportation is not available, however, a windshield survey in summer (peak periods) of 1988 indicated extensive use of r.v.'s and tour buses. The parking areas allocated to r.v.'s were filled to capacity on a Saturday and five (5) tour buses were noted in the lot).

Some of the expected market demand that can be discerned from this and other museum visitation profiles indicate the following:

A. At Museum

- food (cafeteria)
- gifts (theme of museum and/or local area)
- parking (possible r.v. service)
- scheduled events/displays
- shuttle service
- promotion of other area attractions
- translation (nationality specific)
- children amusements to complement main attractions/day care

B. Local Service Centre (i.e., Wetaskiwin)

- Accommodation
    - fixed roof
    - camping
    - r.v. - full service
    - bed and breakfast
    - rental cabins
- Restaurant/fine dining/fast food
- Shopping
    - unique shops
    - souvenirs and crafts (Canadian and local)
    - boutiques
    - regular travel supplies
- Auto/r.v. service: gas, etc.
- Bus/tour service, shuttle to/from museum, shuttle to/from airport
- Other attractions - recreation/events/amusement
- Meeting facilities

C. Regional Service Area

- Golf courses
- Lakes/water and natural areas
- Events and festivities
- Special interest - horse riding, childrens' parks, local theatre, outdoor pursuits, etc.

These needs have been extrapolated based on such factors as length of stay, age groups, origin, household sizes, propensity to spend, mode of travel and other visitor characteristics. Based on these requirements, it is safe to assume that demand will be directed largely at Wetaskiwin, Edmonton and at centres that are on the particular travel corridors leading into Wetaskiwin and that can service the needs of the travelling public. Those tourists seeking other forms of accommodation besides normal hotels and motels will be attracted to the nearest full service camping and r.v. facilities, especially in close proximity to the lakes and water bodies. (More discussion on the market profile will be provided in Section 3).

1.6 TOURISM DEVELOPMENT OPPORTUNITY AREAS

A final element of consideration in defining R.A.M.'s region of influence is the existing and potential areas of tourism infrastructure. Although not discussed in detail in this section of the report, an overview of the opportunities will be presented to provide an indication of where some of the essential elements of a strong regional tourism industry can eventually occur.

The present infrastructure of tourism facilities and services is comprised of developed recreational lands and facilities, tourist accommodation, food and beverage establishments, service stations and various other retail and service operations. Eight specific tourism development opportunity aspects have been addressed in this section. Suggestions regarding possible ways to further develop any opportunities will be presented in later sections of this study.

The possible opportunity areas are located in:

- **the regional and local centres**
- **rural communities**
- **natural/wilderness areas**
- **parks**
- **along the major travel corridors.**

and include the following:

1. public recreational lands and facilities
2. private recreational lands and facilities
3. fixed roof accommodation
4. vacation farms
5. food and beverage establishments
6. information services
7. auto/r.v. sales and service
8. other retail

1. Public Recreational Lands/Facilities

The public recreational lands and facilities comprise the core of the existing available tourism and recreational opportunities. For example, public parks comprised over 80% of the total available camping units in Battle River Country when the Battle River TDA was done in 1983. Many of these facilities are directly associated with the natural resources of the region and serve local, regional and provincial markets depending upon the size, nature and location of the park. The public recreational lands and facilities are well distributed throughout Battle River Country (Zone 5) and David Thompson Country (Zone 4), but are more heavily concentrated near urban centres and along regional travel corridors, around lakes, within river valleys and within physiographic units with moderate to high capabilities for outdoor recreation. Several specific national, provincial and municipal parks in Zones 4 and 5 provide many tourism and recreational opportunities. These range from lands such as Elk Island National Park east of Edmonton with both water and land based recreational activity area to Provincial parks with limited facilities or full services and amenities. Also included in this category are municipal campgrounds, recreation areas and golf courses.

2. Private Recreational Lands/Facilities

Within Battle River Country, and within close proximity to Wetaskiwin from David Thompson Country, there are very few private recreational lands and facilities. These private facilities tend to provide a variety of recreational and tourist opportunities and services or very specialized opportunities such as horseback riding.

There are three "resort" facilities offering camping and some recreational and tourist services. Also, two small private campgrounds are located at Buck and Pigeon Lakes, and several around Gull and Sylvan Lakes. In addition, there is some horseback riding and two guest ranch/campground facilities operating in the Zones 4 and 5 which cater to specialty market groups.

3. Fixed Roof Accommodation

The availability and quality of fixed roof accommodation varies significantly from one area to another in Tourist Zones 4 and 5. The smaller towns and villages generally do not offer much choice beyond the small country hotels which are primarily older properties lacking in appeal to visitors looking for lodging. The larger towns and cities such as Ponoka, Leduc, Camrose, Wetaskiwin and Stettler contain the greatest concentration of accommodation facilities as well as those which are the most attractive and appealing to visitors. The north-south corridor, associated with the heavily populated area from Leduc to Stettler, offers visitors the greatest choice of lodging.

4. Vacation Farms

Battle River Country presently has the largest number of vacation farm operations of all other tourist zones in Alberta. There are approximately seven vacation farm operations in Battle River Country, concentrated around Millet. Five of the farms provide lodging in their homes, three of these also provide camping facilities and the remainder have a camping area only, with the use of an indoor washroom. All are small family businesses and two of the farms also double as bed and breakfast operations. Three of the vacation farms are open year round. Total capacity of the seven operations equals about thirty guests, not including the additional areas for camping.

5. Food and Beverage

The largest concentration of food and beverage establishments occurs in the larger towns and cities located along the north-south corridor of Highways 2, 2A and 21. Leduc, Wetaskiwin, Camrose, Stettler and Ponoka offer a limited range of choices including fast food, family dining and formal service. There are also some regular family dining restaurants throughout the remainder of Tourist Zones 4 and 5. However, the choice of establishments is limited and in many of the smaller towns and villages consists of only the local cafe which is often associated with the hotel.

6. Information Services

There are sixteen (16) T.I.C.'s located throughout Battle River Country. Several of these would have immediate relationship and provide support to the Wetaskiwin area traveller: Bashaw, Camrose, Castor, Consort, Leduc, Sherwood Park, Stettler, Wetaskiwin/Bearhills. (Open May to September)

Also of extreme importance is the new Gateway TIC just south of Edmonton along Highway 2. This facility should become a prime site for marketing R.A.M. to the travelling public. Although the annual visitation figures do not reflect consistent increase in annual visitation, there is a high demand for information services and this demand is expected to increase in the future. Proper signing, accessibility, trained staff and current promotional materials/a.v. equipment and information on the region is essential to maximize the use of the centres. (More detailed discussion on Information Services will be provided in Section 2).

7. Auto/R.V. Sales and Service

The availability of service stations in Tourist Zones 4 and 5 does not appear to present a problem for the travelling public. There is a fairly good distribution of stations to obtain fuel. Additional automotive services are also available in most of the towns or larger villages. R.V. sales and service however are concentrated in the larger centres where specialized mechanics and service people are available.

Also, although there appears to be an adequate distribution of automobile services in the Wetaskiwin area, in some of the region that is less heavily travelled, many stations close earlier in the evening because the demand at that time of the day is generally quite low.

8. Other Retail

As noted earlier, a diversity of retail operations to service the tourist needs are spread throughout many local and regional centres around Wetaskiwin. However, there is an obvious concentration in the larger towns and cities which occur mainly along the north-south corridors of Highways 2, 2A and 21. Supplies and hardware stores to cater to the needs of basic outdoor recreational pursuits are available in many towns and villages. On the other hand, special retail items, boutiques, craft shops and more select shopping may only be available in cities such as Wetaskiwin, Camrose, Leduc and Red Deer. Even more specialized items and services may only be available in Edmonton causing the tourist to leave the immediate area.

In summary, it is evident that the infrastructure for regional tourism is concentrated in the larger urban centres, with complementary services available for select users in the rural parts of the three adjoining Counties. Therefore, with respect to the **opportunity areas**, impact from R.A.M. visitation will accrue to: (in order of significance)

1. **Wetaskiwin**
2. **Ponoka/Camrose**
3. **Edmonton**
4. **Public recreational areas**
5. **Private recreational areas**
6. **Smaller outlying centres**

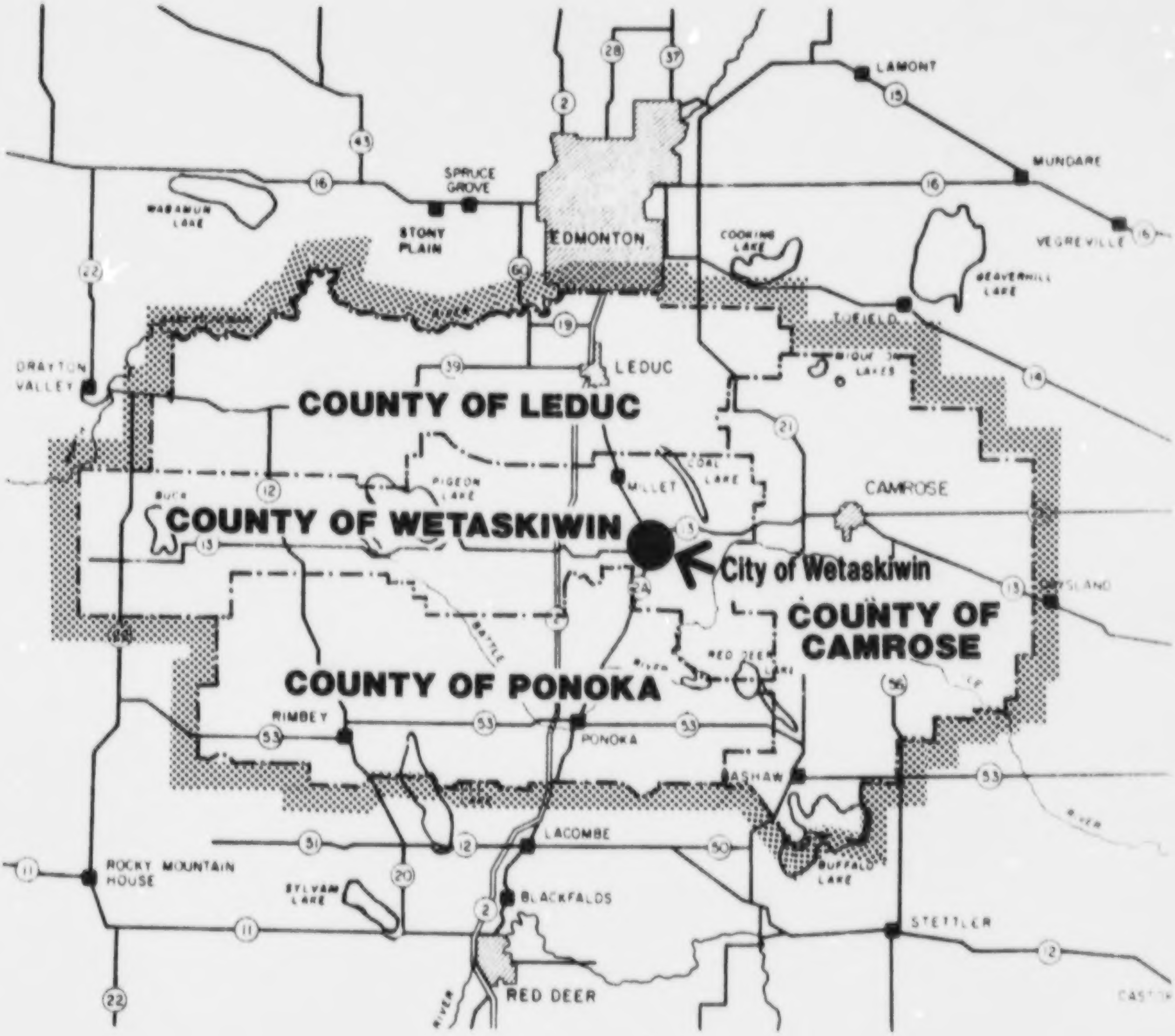
The extent and type of impact will depend on marketing, availability of services and type of market demand.

1.7 SUMMARY

Although we estimate that the museum's impact will be felt throughout Northern Alberta as a result of projected inter-regional and inter-provincial visitation, the area that will benefit the most is the region that can capitalize on the direct expenditure of the visitors. It is these visitors that will seek other attractions and entertainment, accommodation, recreation and services when visiting the museum for a short stay or extended stay. The amount, location and quality of this infrastructure will help determine expenditure and length of stay in the immediate region.

The factors considered were location of the generator, transportation patterns, location of service centres, attractions, market demand and tourism development opportunity areas. From these factors we were able to discern various areas of impact. The areas consist of the following:

1. **City of Wetaskiwin (proper and immediate rural area)**
2. **Adjacent Counties of**
    - a. **Wetaskiwin**
    - b. **Leduc**
    - c. **Ponoka**
    - d. **Camrose**
3. **Surrounding smaller centres**
4. **Centres on major travel corridors, i.e. Millet, Ponoka, Camrose, Leduc, etc.**
5. **Within a region bound by Highway 22 on the west side, Highways 11 and 12 to the south, Highway 56 and Camrose to the east, and extending as for north as Edmonton, Highway 16, and Elk Island Park.**
   (See Figures 5, 6, 7).



LAMONT
MUNDARE
VEGREVILLE
SPRUCE GROVE
STONY PLAIN
WABAMUN LAKE
EDMONTON
COOKING LAKE
BEAVERHILL LAKE
TOFIELD
DRAYTON VALLEY
LEDUC
COUNTY OF LEDUC
MILLET
COAL LAKE
CAMROSE
PIGEON LAKE
BUCK
COUNTY OF WETASKIWIN
City of Wetaskiwin
COUNTY OF CAMROSE
DAYSLAND
COUNTY OF PONOKA
RED DEER LAKE
RIMBEY
PONOKA
BASHAW
LACOMBE
BUFFALO LAKE
ROCKY MOUNTAIN HOUSE
SYLVAN LAKE
BLACKFALDS
STETTLER
RED DEER
CASTOR
RIVER
BATTLE

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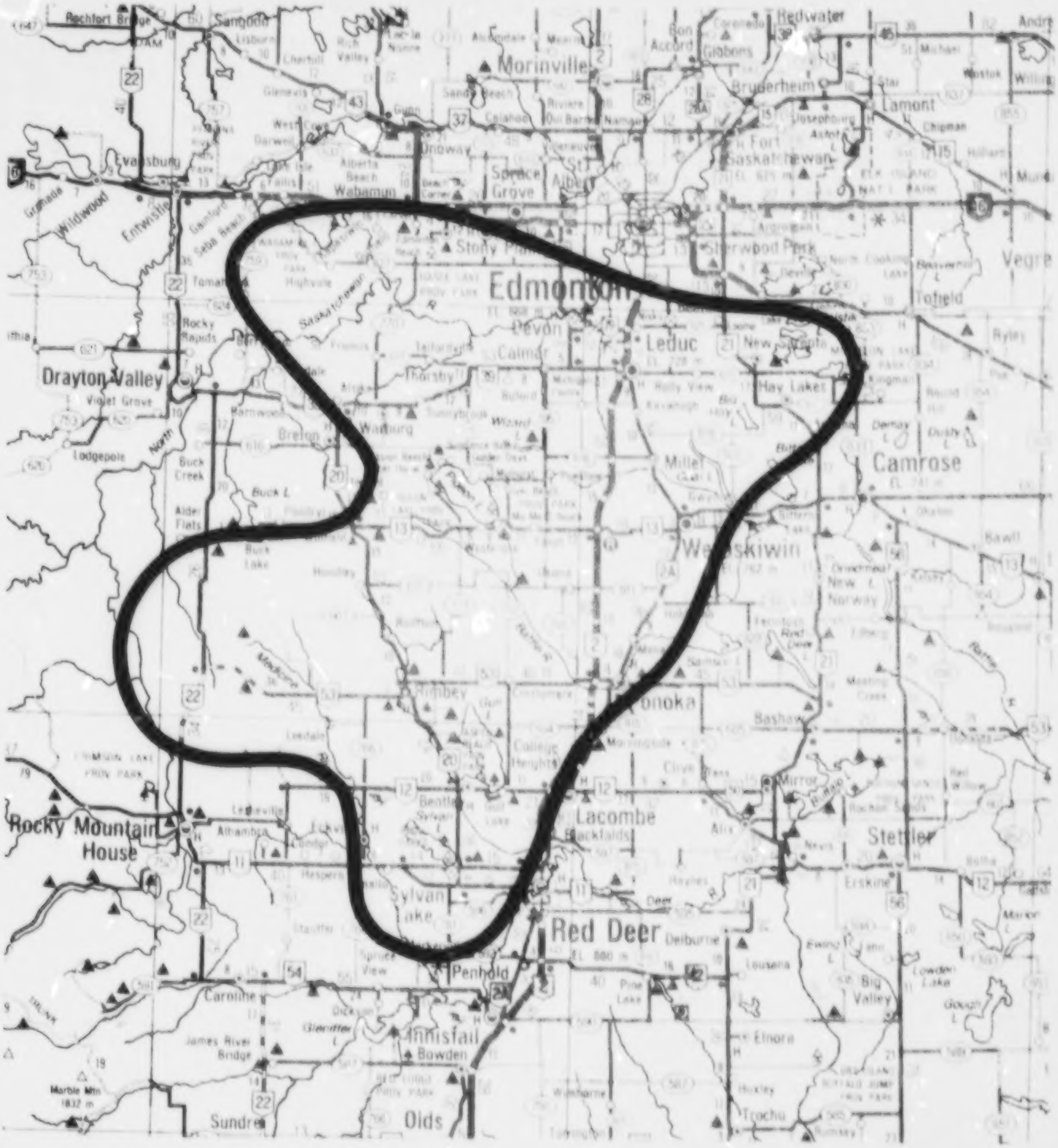
Figure 5

COUNTY JURISDICTIONS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Alix
Mirror
Tofield
Lamont
Bruderheim
Gibbons
Redwater
Bon Accord
Sherwood Park
Lodgepole
Buck Lake
Alder Flats
Rocky Rapids

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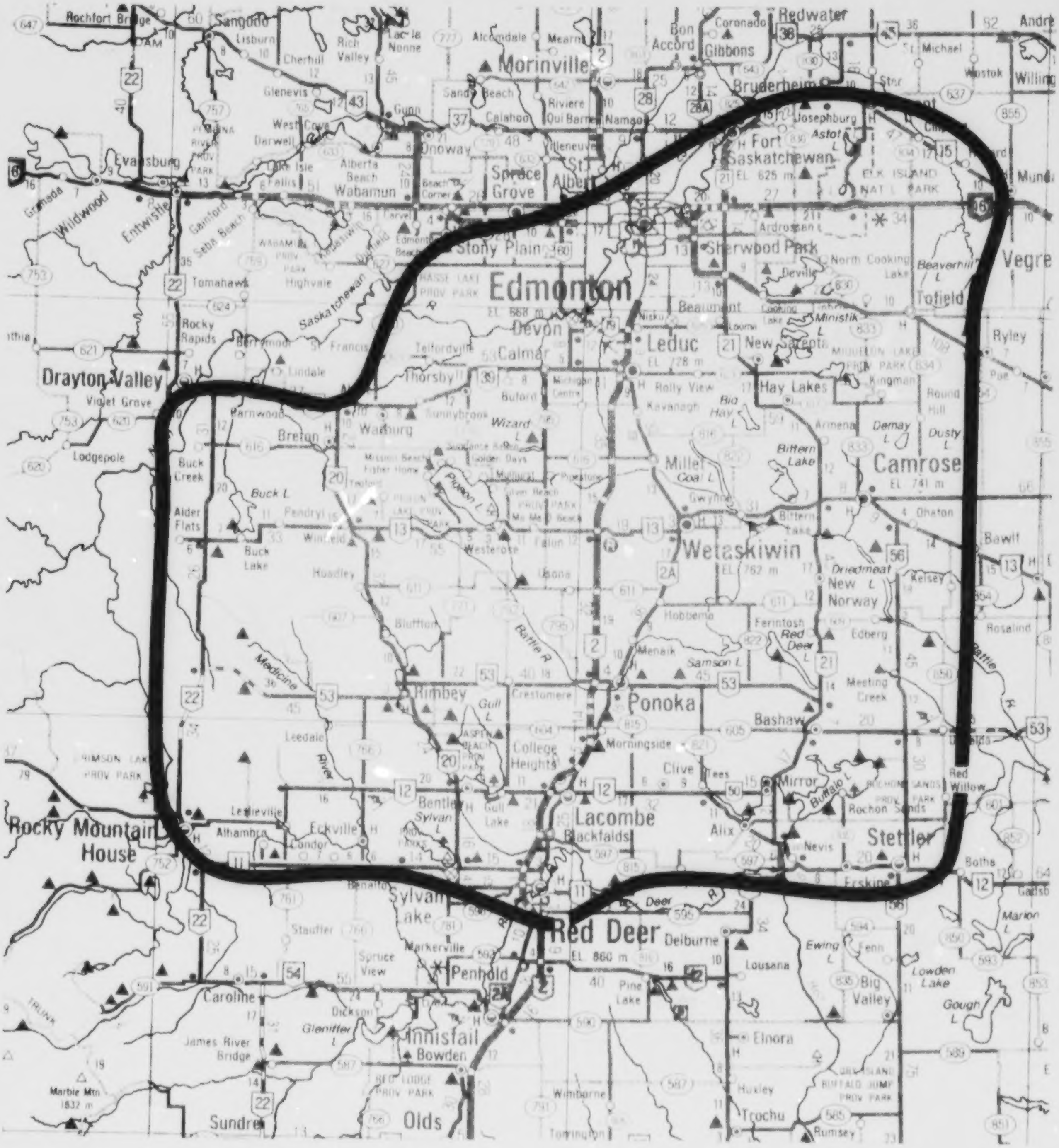
Figure 6

IMMEDIATE
REGION OF INFLUENCE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Vegreville
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Leduc
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Ferintosh
Lacombe
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Erskine
Botha
Red Deer
Sylvan Lake
Bentley
Eckville
Rocky Mountain House
Leslieville
Condor
Caroline
Penhold
Innisfail
Bowden
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Sundre
Delburne
Elnora
Trochu
Big Valley
Pine Lake
Markerville
Spruce View
Benalto
Gull Lake
College Heights
Morningside
Crestomere
Bluffton
Hoadley
Leedale
Medicine R
Battle R
Samson L
Red Deer L
Bittern Lake
Dried Meat L
Miquelon Lake Prov Park
Saskatchewan R
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Sangudo
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James River Bridge
Huxley
Rumsey
Lousana
Ewing L
Torrington
Wimborne
Rich Valley
Lac la Nonne
Gunn
Onoway
Alberta Beach
Calahoo
Namao
Legal
Rosalind
Kelsey
Dinant
Armena
Kingman
Round Hill
Dusty L
Demay L
Gwynne
Ma-Me-O Beach
Westerose
Falun
Usona
Wizard L
Sunnybrook
Buford
Rolly View
Kavanagh
Big Hay L
Cooking Lake
Ministik L
Lindale
Telfordville
Berrymoor
Violet Grove
Cynthia

Figure 7
REGION OF INFLUENCE

The City of Wetaskiwin is expected to provide most of the immediate and essential services to the R.A.M. visitors as well as complementary events and attractions to R.A.M. The adjacent counties will provide the rural opportunities, scenic experiences and natural area amenities such as parks, campgrounds, lakes and related outdoor recreational activities. The surrounding smaller centres will be influenced as a result of traffic flow destined to the museum, being on a circle tour or having some necessary services to complement the larger centres as well as having some additional local attractions. Any centre on a major travel route such as 2, 2A, 13, 21, or 12 will also be affected. The larger centres will be looked upon to provide similar services to Wetaskiwin especially if Wetaskiwin can not supply the demand, eg. accommodation etc. The smaller ones will likely provide available services to the pass through market.

Finally, because of the many, although less important attractions in the area, and the potential for circle tours extending from the Cities of Edmonton, Wetaskiwin, Camrose and into the rural and natural areas to the west of Highway 2, impact will accrue to an overall region that can keep visitors entertained for longer than just their 3-4 hour visit at the museum. The extremities of this region also act as major routes to and from other parts of the province. It should also be noted that important factors such as major attractions and special events that occur outside the region will continue to draw the region's visitation into other parts of the province. Edmonton, Calgary, Rocky Mountain House, Jasper and Banff, for example will be prime benefactors, especially during peak visitation periods.

INVENTORY OF TOURISM ASSETS AND INFRASTRUCTURE

2.0 INVENTORY OF TOURISM ASSETS AND INFRASTRUCTURE

2.1 ACCOMMODATION

Accommodation is a principle aspect of any local tourism infrastructure and services. The central idea of having a stock of local or nearby accommodation facilities is that the overnight visitation can be serviced at or near the point or area of destination. A diversity of accommodation with respect to quality, quantity and location is required to service a diverse market. Tourists in Alberta utilize various forms of accommodation depending on such factors as:

- length of stay
- socio-economic background
- interests
- point of origin
- travel modes
- trip purpose

The inventory of accommodation facilities for the area of influence includes the following types:

- hotel/motel
- lodges/cabins
- guest farm (vacation)/Bed and Breakfast
- Campgrounds (including trailer or r.v., parks, etc.)

(Another category includes "private homes" which will not be described here, except to note that a significant amount of present visitors to the area are accommodated by friends and relatives).

It is evident that the larger centres have the largest share of accommodation in the form of hotels and motels; and many of the campgrounds are also close to some of the urban centres. Guest farms, bed and breakfast and any other lodging facilities or resorts and the remainder of the campgrounds are removed from the urban centers and mainly associated with water bodies and other natural areas.

The following describes the current supply of all accommodation within the region:

o	Hotel/Motel	3,560 rooms
o	Lodges/Cabins	3 operations
o	Vacation Farms (B&B)	7 operations
o	Campgrounds (includes r.v.)	3,604 stalls

2.1.1 Hotel/Motel

The availability and quality of fixed roof accommodation varies throughout the region of influence. The quality facilities that are most appealing to visitors are in the larger centres of Wetaskiwin, Leduc, Camrose, Red Deer, Ponoka, Devon and Stettler. (Edmonton will of course be a major supplier of fixed-roof accommodation).

The smaller centres have few establishments, but only some are of relatively good quality. It appears that most of the hotel/motel units are concentrated east of Highway 2 and any fixed-roof hotel/motel property to the west of Highway 2 is older stock and not too attractive to destination visitors.

The following table shows approved accommodation by community:

TABLE 1

Regional Accommodation

Community	Rooms	Community	Rooms
Camrose	275	Devon	82
Bashaw	30	Millet	5
Stettler	295	Sherwood Park	40
Tofield	20	Red Deer	1,474
New Norway	9	Lacombe	106
Drayton Valley	354	Sylvan Lake	104
Ma-Me-O Beach	4	Rocky Mtn. House	261
Leduc/Nisku	195	Ponoka	124
Wetaskiwin	85	Rimbey	87
		Bentley	10
Total (Region)		**3,560 (2,086 without Red Deer).**	

(Source: Alberta Accommodation Guide, TDA's and Zone Marketing Plans, 1988)

Average occupancy for operations in the major centres like Wetaskiwin continues to range from 60 to 70%. Business travellers (ie. work crews, etc.) continue to dominate the user market with well over 50% for the large centres and well over 70% for the smaller centres. The conventional tourism market accounts for 15 - 25% of the market, but this occupancy in concentrated mainly between June and August so that summer season demand peaks for many facilities. (Wetaskiwin and District Chamber of Commerce). It is also important to note that the most prosperous hotels and motels are located on the primary highways and on well travelled thoroughfares such as Highways 2, 21, 13, 12 and 2A.

2.1.2 Lodges and Cabins

Another form of fixed-roof accommodation are the lodges, chalets or cabins. These are described by the industry as being "self-contained" with kitchenettes, full bathroom or partial wash facilities, and can be utilized year-round. Cabin type accommodation is quite limited in the immediate Wetaskiwin area; Battle River Tourist Zone lists only two facilities with 15 cabins in total. However, further south in the David Thompson Zone, approximately 97 chalet type facilities are available accounting for 422 units. Very few of these are presently operating year round, especially if they have camping associated with their operations. Unfortunately, most of these facilities exist outside of the region of influence. Operators and tourist zone managers indicate that the demand for these types of facilities, mainly located near water bodies and in prime natural areas, is quite significant. Accommodation is booked well in advance of the peak periods of use. It is estimated that the proximity to both the Edmonton and Calgary markets and limited availability results in the apparent high occupancy of this type of facility. Cabins also offer an alternate form of accommodation to the non-camping public.

2.1.3 Vacation Farms

Vacation or Guest Farms provide a lodging function as well as act as an attraction, often having horseback riding or other specialized recreation associated with the facility. Since 1983/84, the number of vacation farms has grown to seven (7) in the Battle River Tourist Zone and to seventeen (17) (including hostels) in the David Thompson Zone. Each of these have varying attractions and may include camping as well as farm house or cottage lodging. Bed and Breakfast (a form of short duration board and room) in the farmer's home is very limited in this area. Only two (2) exist in the County of Leduc. This form of accommodation caters to selected seasons of the year. Tourism Zone officials have noted that the operators have much to learn about this new service these farmers are providing. (Discussion with BRTA Zone Manager Feb/89).

2.1.4 Campgrounds

Within the region of influence and beyond it there are several campground facilities that provide overnight accommodation for tourists. The quality of the campsites (serviced versus unserviced) varies throughout the region as does the extent of each facility. Furthermore, camping facilities occur in various forms of ownership and administration, ranging from the National Park, Provincial Parks, to a number of those that are privately owned. In each case, tent and trailer camping areas contain a limited amount of stalls that may or may not have services such as water, sewer or electrical hook-ups.

The following table provides an indication of the existing camping facilities in the region of influence, many of these falling into the Battle River Country and near the smaller communities or adjacent to water bodies.

TABLE 2

Community/Area	Sites	Names	Operator/Agency
Camrose	90	Valleyview	Municipality/County
		Tillicum Beach	
Bashaw	192	Bashaw Municipal	Municipality
		Johnson's Beach	County
		Pelican Point	County
		Red Deer Lake	Alta. Transportation
Stettler/ Rochon Sands Provincial Park	166	Rochon Sands	Provincial Parks
		Buffalo Lake	Provincial Parks
		Stettler Lions	Local Club
		Stettler Rotary	Local Club
Tofield	50	Amish Creek	Alta. Transportation
		Black Nugget Lake	County

Community/Area	Sites	Names	Operator/Agency
Bittern Lake	10	Bittern Lake	Alta. Transportation
Cooking Lake	15	Ministik	Alta. Transportation
Donalda	20	Ferry Point	Local Club
Erskine	200	Ol' MacDonald	Private
Ferintosh	16	Ferintosh Municipal	Municipality
Meeting Creek	10	Meeting Creek	Alta. Transportation
New Norway	10	Duhamel	Alta. Transportation
New Sarepta	422	Joseph Lake Miquelon Lake	Municipality Provincial Parks
Alder Flats	20	Fairways West Golf Course Utopian Dude Ranch	Municipality Private
Buck Lake	10	Buck Lake Campground	Alta. Transportation
Ma-Me-O Beach	185	Black Bull Golf Resort Ma-Me-O Beach Prov. Park Mound Red Park	Private Provincial Parks County
Pigeon/ Westerose Lake	> 300	Pigeon Lake Zeiner	Provincial Parks
Drayton Valley	59	Drayton Valley Campground Easyford Park	Alta. Transportation County
Ft. Saskatchewan	56	Lucky Lake Trout Farm Turner Park	Alta. Transportation Municipality
Leduc	35	Leduc Lions Parkdale Farm	Local Club Private
Wetaskiwin	22	Wetaskiwin Community	Local Club (Chamber)
Calmar	114	Wizard Lake Jubilee	County
Devon	180	Pat O'Brien Lions	Local Club
Sherwood Park	228	Bretona Half Moon Lake	Alta. Transportation Private

Community/Area	Sites	Names	Operator/Agency
Rimbey	202	Medicine Lake	Alberta Forestry
		Open Creek Park	Local Club
		Parkland Beach	Private
		Pas-Ka-Poo	Municipality
		Rimbey Campground	Alta. Transportation
Bentley	78	Crazee Akerz Farm	Private
		Sunset	Private
Gull Lake	1050	Aspen Beach Provincial Park Brewers Lakeview	Provincial Parks
Gull Lake	140	Degraff's Camp Resort	Private
		Rim Rock Resort	Private
Mirror Lake	103	Lions	Local Club
		The Narrows Rec. Site	Provincial Parks
Sylvan Lake	> 550	Beach Motor Home Park	Private
		Blackstar Trailer Park	Private
		Don's Trailer Park	Private
		Happy Holiday Trailer Park	Private
		Jarvis Bay	Provincial Parks
		Lakeside	Private
		Lakewood	Private
		Rainbow	Private
Ponoka	75	Nelson Lake	Alta. Transportation
		Ponoka Stampede Trailer Park	Local Club
Total (Region)	**3604**		

(Source: Alberta Campground Guide, 1988)

There are also several roadside campsites that are used for emergency or day use purposes only. Also, immediately outside the area of influence and throughout the Battle River Country are large Provincial Parks such as Big Knife, Dillberry and Gooseberry, all containing a significant amount of camping sites.

Usage and occupancy rates of the above noted camping facilities is concentrated to the Summer months, June through August and of course on weekends when the prime sites such as Pigeon, Miquelon, Jarvis Bay and Rochon Sands receive 75 to 100% occupancy. (Alberta Recreation and Parks). All facilities on the popular water bodies that offer other recreation besides camping are the most attractive.

2.2 FOOD AND BEVERAGE ESTABLISHMENTS

As noted in Section 1, the largest concentration of food and beverage establishments occurs in the larger towns and cities within the region of influence. The communities are located along the major travel corridors of Highways 2, 2A, 21 and 12. Wetaskiwin, Leduc, Camrose, Ponoka and Stettler offer the greatest range of choices outside of Edmonton or Red Deer. Over the past few years fast food chains have begun to locate their services in towns and smaller cities throughout Alberta, allowing for greater diversity of selection. Good family dining and fine dining establishments however, are limited in the region of influence, by space, quality, cuisine and hours of operation. It appears that the availability of food services in many of the centres has been the fast food establishments and cafes along highway commercial strips.

2.2.1 Food/Dining Establishments

Quality or regular restaurants are located in the larger towns and cities throughout the region of influence. In many instances regular/family dining facilities are associated with the hotels or motels and as such may also have a lounge or saloon connected to the facility. The following discussion concentrates on Wetaskiwin where the generator will produce the greatest demand for this type of service.

In Wetaskiwin, out of approximately 35 food service establishments:

- 5 are considered fine dining
  - O'Briens
  - The Carrol
  - R's Place
  - Silver Coach
  - MacEachern House (tea house only)
- 15 are considered regular or family dining spots with some special cuisine (ie. Chinese) and regular menus/average prices. Examples include:
  - Boston Pizza
  - 49er Diner
  - Club Cafe
  - Green Gables
  - Grandma Lee's
  - Smitty's

o 15 are considered fast food establishments and may be located along main arterials (commercial), downtown or in malls. Examples include:

- McDonald's
- Dairy Queen
- Fuzzy Orange
- Good for U Yogurt

A brief overview of the supply of food and beverage establishments in selected municipalities indicates that Wetaskiwin has one of the better supplies in the region. However, this assessment only takes into consideration the existing population (1986 Census) and not the traffic volumes on adjacent or proximate roadways. The following table shows that Wetaskiwin has a ratio of approximately 280 persons per local dining establishment.

TABLE 3

Food and Beverage Establishments by Population

Community	Population (1986)	Establishments	Nbr. Persons/ Establishment
Wetaskiwin	10,103	36	= 280
Ponoka	5,476	19	= 288
Camrose	12,571	37	= 337
Wainwright	4,643	18	= 258
Rimbey	2,106	6	= 351
Millet	1,428	3	= 476

An assessment of the market implications is described in a later section of this report. However, it is safe to assume from this inventory that certain types of food and beverage establishments may be impacted differently by the expected demand from the generator.

2.2.2 Fast Food Outlets

Fast food outlets can be segmented in two types: chains and locally owned operations. The larger centres such as Camrose and Wetaskiwin have just recently begun to attract some of the national fast food chains such as Arby's, and McDonald's. These larger fast food operations are now complementing those operations that have existed for some years, such as Dairy Queen, Kentucky Fried Chicken and other locally-owned outlets. They select strategic locations along major arterial roadways within the cities so that exposure is good for both local and pass through traffic. In Wetaskiwin, most of this inventory is located along Highway 2A (56th Street) which is already benefitting from the "Auto Mile" traffic. In Camrose, similar highway commercial development occurs along 48th Avenue. Leduc's inventory of highway commercial fast food establishments is very limited as a result of the traffic and access constraints; Leduc is by-passed by Highway 2 and the Highway 2A turn off occurs south of the City. Millet is situated in a prime location for new fast food outlets, however, the market would have to be highway traffic consumers. Red Deer, of course has an excellent supply of fast food outlets on Highway 2 and on the strip through Red Deer.

Fast food outlets that do not occur along arterial roadways are often located within malls/shopping centres and to a limited degree in the downtowns. The other type of fast food facility caters to local consumers at present and is usually not easily noticeable by tourists.

2.2.3 Special Service Restaurants

The special service restaurants that operate in Wetaskiwin are limited to Chinese/Oriental food (four (4) outlets) or are theme oriented. Two new restaurants are located in converted homes and have incorporated trendy design and marketing schemes: Break Time and the MacEachern Tea House (also includes Asley's ladies wear boutique upstairs). Hours of business, however, only extend to 4:30 p.m. and menus are oriented to lunches and afternoon tea.

Two other restaurants that are unique in their services and location are the Green Gables which recently opened in the courtyard of the reconverted Post Office building and Schooners, which promotes itself as a seafood restaurant and offers "take out" as well as in-house dining service.

2.3 MEETING AND RECEPTION FACILITIES

The Wetaskiwin area has had a problem with the availability of meeting facilities for many years. The Wetaskiwin and District Chamber of Commerce (discussion with

Laurill Windgrave - Chamber Manager) advises that the peak periods of summer/spring are the most difficult times to find any available space for large receptions, conferences or seminars. At present there are only three (3) community halls and two major restaurants that can accommodate large gatherings in Wetaskiwin. Surrounding areas also offer small halls or community centres that allow for classes, theatre, banquets, major receptions (See Table 4). It was confirmed by Camrose Chamber of Commerce officials that their city's facilities receive a great amount of overflow from Wetaskiwin during peak periods.

TABLE 4

Wetaskiwin Area Reception Halls

Hall	Capacity	Cost	Contact	Notes
Memorial Centre	300	$310	352-2662	Often fully booked
Seniors Centre	200 & 60	$100 $80	352-4646	Two rooms,one kitchen
Moose Hall	200	$230 +$75	352-2580	Rental for kitchen
Wayside Inn	100 & 90 or 240	Nil	352-6681	No charge if meal served
Renos Restaurant	88	Nil	352-4479	No charge if meal served. Buffet included
Falun Community	220	$125	352-4819	Full kitchen included
Mulhurst Community	252	$100 +$25	389-3829	New centre Kitchen rental
Central Community	250	$125	352-4951	No summer bookings, may not bring in caterer
Angus Ridge	125	$100	352-0612	Small kitchen
Drill Hall	800	$28/ person	352-0060	Not conducive to many smaller gatherings and books up early during peak periods

(Source: Wetaskiwin and District Chamber of Commerce)

2.3.1 Halls

The largest hall in the area is the Memorial Centre which is booked several months in advance of peak period use and already (February 1989) has no weekend (Fridays/Saturdays) opening for the summer. It has a seating capacity for 300 people and a full kitchen. The Moose Hall can seat up to 200 only and charges extra for the use of the kitchen. The other complex that is available is the Seniors Centre which has two separate rooms, one seating up to 200 people and the other seating 60 people. One kitchen is available to serve both rooms.

2.3.2 Restaurants

Two city restaurants have rooms available to hold gatherings. Each restaurant charges nothing for their premises if their catering services are used. Renos has space for 88 people, while the Wayside Inn, one of the most popular facilities, can accommodate 90 and 100 people in two separate rooms or 250 for banquet (sit down) if the two spaces are combined. Three hundred (300) can be accommodated for a reception (stand up). Catering for these and other facilities can be provided by other off-site caterers which will provide meals for as little as $7.50 per person to about $15 per person for a more expensive menu and elaborate table service.

2.3.3 Other Area Complexes

Besides the few places in Wetaskiwin proper, the surrounding rural area communities have some appropriate complexes to house large gatherings. The Falun Community Centre west of Highway 2 seats up to 250 people and costs $125.00 per event and includes a kitchen. The Mulhurst County Centre also west of Highway 2 is only two years old and seats up to 252 people and is only $100.00 per day but costs $25.00 extra for the use of the kitchen. Southwest of Wetaskiwin a small facility called the Angus Ridge Hall can seat up to 135 people and includes a kitchen. The Central Community Hall just north of Gwynne can seat 250 people and has full kitchen. The summer months are usually booked solid by local residents making it unavailable to non-residents.

Any gathering much larger than 300 must be accommodated in Edmonton or Red Deer, or the Drill Hall (seating capacity 800) which is often not conducive for certain gatherings.

2.4 NATURAL AND RECREATION AREAS

A significant part of the tourism infrastructure for the region of influence are the natural areas comprised of various landscape features such as water bodies and scenic areas. To complement their attractiveness, there are also some man-made recreational developments such as resorts and other facilities for recreational opportunities. Although the region does not abound with key developed tourism resources, development potential appears to be extensive and could focus on water or land-based recreation.

2.4.1 Water Bodies

The physiographic features of the Wetaskiwin region lends itself to a prime outdoor recreational resource. The lakes and river systems form the greatest share of this resource. Within the region of influence are located several water bodies that presently provide limited to extensive recreational use and activities. They are listed in the following table along with a summary of present uses. Each of the water bodies has a degree of development expansion potential.

TABLE 5

LOCATION	ACTIVITIES												FACILITIES			
	SM	MB	CAN	SAIL	FISH	CAMP	HIK	BIRD	HUNT	ICE FISH	SNO MOB	X/C SKI	PARK	REC AREA	RES CAB	BOAT RAMP
BEAVERHILL LAKE								X								
COOKING LAKE	X	X	X	X	X	X	X	X	X		X	X		X		
MINISTIK LAKE								X								
MIQUELON LAKE	X	X	X	X	X	X	X	X	X		X	X	X		X	X
DEMAY LAKE					X											
DRIEDMEAT LAKE	X	X	X	X		X	X	X	X			X				
BITTERN LAKE								X								
BIG HAY LAKE								X								
COAL LAKE		X	X	X		X		X			X	X		X		X
RED DEER LAKE	X	X	X	X		X	X	X	X		X	X	X	X		
BUFFALO LAKE	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
WIZARD LAKE		X	X	X	X	X	X						X			
PIGEON LAKE	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
BUCK LAKE	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
BATTLE LAKE			X	X	X	X	X	X	X	X	X	X	X	X	X	X
GULL LAKE	X	X	X	X	X	X	X	X	X			X	X			X
SYLVAN LAKE	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
BATTLE RIVER			X			X	X		X		X	X		X		

(Compiled by IMC from various Parks and Recreation Sources)

LEGEND:

SM = SWIMMING
MB = MOTOR BOATS
CAN = CANOEING
SAIL = SAILING
FISH = FISHING
CAMP = CAMPING
HIK = HIKING
BIRD = BIRD WATCHING
HUNT = HUNTING
SNOMO = SNOWMOBILING
RES/CAB = COTTAGES

It is evident that the major water bodies that provide an array of uses are the freshwater lakes: Buck, Pigeon, Buffalo, Miquelon, Cooking, Gull and Sylvan lakes. The smaller lakes have also received intensive types of development such as camping and cottage development. Although these are smaller than the regions prominent five or six lakes they still provide opportunities for water based activities. Opportunities for more development on the major water bodies will be discussed in a subsequent section of this report.

2.4.2. Resort Facilities

Private resort or recreation facilities (for the purpose of this study) are categorized as those facilities that tend to provide recreational and tourist opportunities and services or very specialized opportunities such as horse back riding, groomed cross-country ski trails, golfing and retreats. It is evident that within the Battle River Country there are very few private recreational facilities. (BRTA TDA; discussion with Zone officials Feb/89). Only two, Pigeon Lake Golf Resort and Mobuck Resort, are in the Wetaskiwin region. Of the over 13 resort operations in the David Thompson Country, only two fall within the area of influence and are located in the Gull Lake/Sylvan Lake area. Most of the private developments in David Thompson are situated between Rocky Mountain House and Sylvan Lake, and further south. In summary, most of the limited private facilities including guest ranches and riding stables are farm oriented with little to no developed pool, golf course, racquet sports, and other quality facilities or tourist services.

2.4.3 Public Recreational Lands and Facilities

Public recreational lands and facilities comprise the bulk of the recreational and tourism infrastructure in the region of influence around Wetaskiwin. Some industry officials are of the opinion that the availability of government developed and maintained facilities have caused the private sector to limit their own investment and development opportunities. (Personal conversation with BRCTA officials). Nevertheless, all three levels of government have been responsible for varying degrees of park and continued up-grading will occur throughout the system. Outdoor and natural areas recreation and land area preservation is still the central objective of the Provincial and Federal Park system. Municipal facilities, however, have a different focus as they cater largely and primarily to local residents. Many of these facilities contain campgrounds, golf courses and other facilities such as sports fields, boat ramps, and trail systems. In summary, the most modern outdoor recreational facilities are provided by government. Although many still do not have full services, electrical, water and sewer, annual occupancy level remains high, especially for summer weekends. The following is a listing of key facilities in the region:

TABLE 6

Facility		Occupancy Rate %					
		June		July		August	
Sites		W/D	W/E	W/D	W/E	W/D	W/E
	Elk Island						
	Ma-Me-O Beach	W/E	2,755	W/D	1,100*		
275	Miquelon Lake	12	57	33	80	21	56
296	Pigeon Lake	8	48	24	80	20	49
69	Rochon Sands	9	57	26	79	20	53
10	Buck Lake	Not Available					
	Blackfoot Grazing Reserve	W/E	3,475	W/D	1,300*		
914	Aspen Beach	4	28	22	53	14	33
171	Jarvis Bay (Camping only)	20	92	90	103	79	97
218	Crimson Lake	12	51	49	84	35	64
	Sylvan Lake	W/E	26,750	W/D	19,750*		

(Source: Park User Statistics - Peak Season [April 1 to September 30] Alberta Recreation and Parks Division, 1988)

* 6 Month day use period = April 1 to September 1.

Upgrading or expansion of the existing facilities that are receiving high visitor utilization must be investigated unless demand can be redirected.

2.5 COMMUNITY SERVICES/FACILITIES

An assessment of several other tourism services and facilities was undertaken for this exercise. The region in question is close to the City of Edmonton so that all necessary or emergency tourist services not found in Wetaskiwin, Camrose or the smaller towns and villages can be obtained within a one to one and a half hour trip from Wetaskiwin.

A review of businesses by Standard Industrial Classification (S.I.C.) indicates that the region and Wetaskiwin especially, is served with a cross-section of businesses ranging from automotive to specialty shops with gifts and souvenirs; sports clubs; beauty salons; dry cleaners; rentals and several personal services. **The amount and quality however, must be addressed in many cases.**

2.5.1 Auto/R.V. Service

A review of businesses by S.I.C. in the "Camrose Business Development" region indicates that Wetaskiwin has an excellent supply of auto related service businesses. These include:

o	Auto dealers (new and used)	18
o	Motorhome and travel trailer sales/service	4
o	Home/Auto supply stores	8
o	Tire, battery, parts/accessories	7
o	General auto repair garages	8
o	Paint and auto body repair	9
o	Muffler replacement	2
o	Motor vehicle glass	1
o	Motor vehicle transmission	2
o	Motor vehicle repair and replacement	1
o	Car washes	9
o	Towing/wrecking/radiator	6

(Source: Alberta Economic Development and Trade)

Equivalent auto service is available in Camrose. Some auto parts must be ordered from Edmonton or Red Deer dealer warehouses.

2.5.2 Information Services

Tourist Information Centres (T.I.C.) run by the Battle River Tourist Association along with various Chambers of Commerce and Travel Alberta are located in approximately 16 locations within the Study region. They are as follows:

o Bashaw
o * Camrose (Year Round)
o Devon

- * Drayton Valley
- Leduc
- * Millet
- * Sherwood Park
- * Stettler
- Tofield
- * Wetaskiwin
- Lacombe
- Rimbey
- * Ponoka
- Rocky Mountain House
- * Red Deer (2)
- Sylvan Lake

* Denotes Key Locations

(Summer 1988 figures indicate that Stettler (7,000), Sherwood Park (4,700), Wetaskiwin (2,878) and Camrose (2,761) had a high visitation factor. Unfortunately, record keeping is not standardized at the centres so it is difficult to discern impact on some of the smaller centres such as Millet, which, for example was not open on Sundays).

At least eight (8) T.I.C. locations are key to the visitation for the Reynolds Museum. Some of these that are important to Wetaskiwin and area should receive careful consideration in relocation (eg. Camrose to more accessible location), in signage or exposure, in staffing and hours of operation during summer and fall periods (ie. Millet) and in maintaining good information and promotional materials. Proper and creative theming should also be addressed for marketing purposes. Finally, sophisticated and standardized visitor records should also be maintained to discern market trends for the area.

2.5.3 Special Retail/Service

Tourists require special attention and often request specialized services or products when they are on their vacation. What they require and how they should be catered to depends on the market, their mode of travel, length of stay, origin and other related visitor profile information.

Several business categories (by S.I.C.) with relevance to the tourist trade were investigated for this exercise. (A comprehensive list is included in Appendix 4).

For almost every category, the communities of Camrose, Leduc, Ponoka and Wetaskiwin provide a sufficient amount of representative businesses to service the local and existing demand. (As in other cases, Red Deer and Edmonton would have to supply large or rare orders). Smaller centres such as Rimbey, Tofield, Bashaw and Stettler also provide a good share of these services to the local market. Nevertheless, there are several retail and tourist service opportunities that should be considered by the business community. Some of these are as follows:

1. Jewellery - special gift items/engraving
2. Camera - photographic supplies and services
3. Gift, Novelty and souvenir shops - especially local crafts and gift items
4. Antiques/Collectables - quality Canadiana and local items of interest
5. Caterers - along with restaurants and halls
6. Taverns and Night Clubs - Wetaskiwin has only one establishment
7. Theatre - Wetaskiwin has one live and one motion picture theatre
8. Golf Courses - Wetaskiwin has one 18-hole, grass green (2,813 M) course.
9. Sports and Recreation Clubs/Facilities
10. Gambling Operations - other than Bingo
11. Amusement Parks - such as Miquelon Funland
12. Rental of autos, trucks, bicycles, etc. - catering to peak seasonal needs
13. Sport Shops/Sports Wear - catering to seasonal needs
14. R.V. Service and Sales - including mechanical/inspection services for tour buses
15. Specialty foods/deli - in association with restaurants or independent food stores
16. Liquor/wine shop - specialty products that may not be normally available in Alcb's
17. Pharmacies - with extended opening hours
18. Book stores - carrying an array of Canadian/local literature suitable for sale as souvenirs and gift items
19. Art Gallery - promoting local/Alberta artwork
20. Ladies/Mens/Children's Wear - catering to seasonal needs
21. Shoe store - catering to male/female and children and seasonal needs

Some of the aforementioned represent totally new opportunities and some are simply areas to consider for expansion or merchandising improvements. These areas of concentration are mainly the responsibility of the private sector but do require support from the local or provincial governments for development approvals.

2.5.4 Attractions

Besides the Reynolds-Alberta Museum there are several other events and attractions within and beyond the region of influence. However, an analysis of all the man made and natural attractions in Battle River Country indicates that most (90-95%) are of local and regional significance only. (BRTA TDA Study, 1983, p. 152). The status of those in the David Thompson Country part are also regional but with a greater provincial draw because of the lakes and entrance into the East Slopes. (West Central Alberta TDA Study, 1981, pp. B 77 and B83 and David Thompson Country Marketing Plan, September 1988).

The main attractions (besides R.A.M.) in this region to outsiders are the following products:

- Large warm lakes for summer recreational use
- Red Deer and Edmonton facilities and attractions
- Polar Park
- Strathcona Science Centre
- Ponoka Stampede
- Natural area access, including Elk Island Park
- Wainwright Falcon Hatchery
- Area Golf Courses
- Several small museums

(Future possible attractions include a major raceway near the Edmonton International Airport, A "Birding"Complex/Interpretive Centre on Beaverhill Lake near Tofield, the completion of development at the Blackfoot Reserve near Elk Island Park and an Oil Interpretive Centre/Resort Complex near Leduc or Devon. Native tourist attractions are being considered on the Reserves south of Wetaskiwin. At least five (5) new golf courses are also being considered at present).

The annual events are also largely of only local or regional interest and mainly classified as agriculture, sporting, natural or cultural. Further, they still predominantly occur during the summer months and are concentrated in the urban centres.

The nearest golf courses to Wetaskiwin are mainly located in the Counties of Wetaskiwin, Leduc and Camrose. The following is a list of known courses.

TABLE 7

Golf Courses Near Wetaskiwin

Name	Location	Size
Wetaskiwin	.8 km N on Hwy 2A	18 holes, 2813m grass greens
Tofield	S. Side of Hwy 14	9 holes, 2817m grass greens
Stettler	Hwy 12/56	9 holes, 2833m grass greens
Sherwood Park	3 Courses	
- Belvedere	Hwy 21	18 holes
- Broadmoore	Sherwood Park	18 holes, 5681m
- Country-Side	S on R.R. 232	18 holes, 5110m
Pigeon Lake	Mulhurst (on lake)	18 holes, 5696m (with camping/trailer sites)
Miquelon Hills	Miquelon Lake	9 holes, 1262m (par 3)
Black Bull	Ma-Me-O Beach	18 holes, 6000m (camping)
Leduc	S.W. corner of City	18 holes, 5727m
Drayton Valley	Drayton Valley	9 holes (being expanded to 18)
Devon	Near N. Sask. River	18 holes, 5177m
Camrose	Camrose	18 holes
Breton	Breton	9 holes, 2268m
Bashaw (County 9)	3.2 Km S. of Bashaw	9 holes, sand greens
Alder Flats (Fairways West)	Hwy 22 - 2 km south of 13/22 Junction	18 holes, 6285m
Rimbey Golf & Trailer Park	Rimbey	

(Source: Alberta Golf Guide, 1988; Battle River Country Tourist Guide, 1989)

New golf courses are proposed for various areas in the region and especially to the north towards Edmonton.

2.6 TRANSPORTATION PATTERNS AND VOLUMES

As noted in an earlier section of this report, the transportation patterns and systems determine access, linkages and propensity to travel to certain points in the region. The Reynolds-Alberta Museum will be located along a primary highway (13) that is connected to the province's major travel corridor (Highway 2) and Highway 2A, thereby making access most convenient for local, regional and inter-regional markets. With proper marketing, the Wetaskiwin region can be accessed via several routes from various origins.

The local traffic carriers to Wetaskiwin also happen to be regional and provincial systems and corridors. Highways 2/2A and 13 carry a significant amount of traffic north-south and east-west, respectively. They also provide linkages to other major regional centres and main travel corridors such as Highway 16 that carry traffic from other provinces. Highway 2 also provides a link to the U.S.

Other regional roadways of significance to the Wetaskiwin area are: Highways 11, 21, 14, 12(20), 53, 56, 39, 22, and 60. Each of these will accommodate flow from various points and directions in the province. Traffic issues or evolving patterns on these roads will be affected by the following:

- Increased flow between Drumheller and Wetaskiwin during peak visitation periods.
- Visitation from points east, including Saskatchewan and Manitoba.
- Increased use of Highway 2A from the Edmonton market to the north and Calgary/Red Deer markets to the south.
- Increased use of Highway 13 East and especially 13 West from Wetaskiwin to Highway 2.
- Circle tours promoted by tourism officials.
- Relationship between Banff visitation and other attractions such as Reynolds-Alberta Museum and Tyrell (ie. Will Highway 11 see increase in volumes during peak season?).
- Yellowhead Highway traffic seeking to avoid Edmonton to reach Wetaskiwin (ie. Will Highways 22, 60 and 21 act as north-south linkages?)

An overview of the volumes (1987) on particular sections of the roadways of the regions is provided in the Appendix. It is assumed that the particular roadways to Wetaskiwin and throughout the region will remain the same after the Museum opens. The volumes, during peak periods however, will obviously increase on the more popular routes. Changes in usage may occur as a result of upgrading programs, physical realignments, strategic marketing (circle tours, community promotion, signage, etc.) or new area developments.

Particular sections of roadways to monitor beginning immediately are: Highways 13 (2A to 2), 2A (Leduc to Wetaskiwin and Wetaskiwin to Ponoka), Secondary 616 (Millet to Highway 2), 56 (Drumheller to Highway 13) and 21 (south of the Yellowhead to Highway 13).

2.7 MUNICIPAL SERVICES

The City of Wetaskiwin has been faced with a serious option to growth. As a result of the Reynolds-Alberta Museum being located outside of the City's boundary (approximately 1 kilometer), municipal servicing will have to be extended beyond its present system. As such, an opportunity exists to service several hundred hectares of land to the south and west of the city limits, and therefore directing potential growth to another side of the City. Sanitary sewer, storm, water and highway improvements are required to service the museum, therefore this expanded capacity could help bring on stream new residential, commercial or industrial sites. This servicing option of course carries a high price tag, but it is the City's intent to also address the present system that is operating at or above its design capacity. Problems with the present system have caused frequent sewage back-ups.

The City of Wetaskiwin recently commissioned a series of studies to investigate the servicing options for the Reynolds site. The most critical and costly item was the sanitary sewer as a result of the distance factor. Any option would have to consider conveying the sewage to the sewage treatment facility at the other end of the City. Another item of servicing is water for fire protection and regular water service. Again, as a result of the remote location of the site, it is anticipated that the City will have to upgrade its existing infrastructure. Improvements to Highway 13 west of Highway 2A to the Museum site were also studied and cost estimates were provided, incorporating some estimates of storm sewer to service the museum site only by way of an off-site parkway.

2.7.1. Sanitary Sewer

Infrastructure Systems Ltd. investigated seven (7) alternatives to service the site area. The alternatives were divided into two groups; servicing through the City by a north route or servicing around the south end of the City. When examining the northern option it was found that to accommodate any additional development, major upgrading was required on lift stations, and a gravity trunk. This required upgrading combined with the very poor soil conditions that exist in the northwest area of the City, results in a very expensive system particularly when the cost per serviceable hectare is considered. (Sanitary Servicing Final Report, ISL Ltd., November 1988). In addition, none of the north routes can provide gravity service to the area adjacent to Highway 13 for future commercial development.

Out of four alternatives investigated for the south sanitary the most cost effective system will also service 695 hectares of land on the south and west side of the City. Total cost for the system is $5.3 million and therefore results in a total system cost per serviceable hectare of $7,630 or $3,083 per acre. (See Appendix 5). This is still a relatively expensive alternative but least of all seven investigated by ISL Ltd.

2.7.2 Water

The recommended alternative for providing water service to the Reynolds Museum site entails constructing a 300mm line down Highway 13, a 300mm line down 47th Avenue along with a 450 line back north along 60th Street to 55th Avenue. By constructing the 300mm line on Highway 13 the Highway 13 strip becomes totally serviceable with all three utilities in place. The section of land northeast of the Reynolds site is serviced only by water as no storm or sanitary sewer capacity exists. The estimated total cost for the recommended alternative is $2.031 million which does not include any servicing beyond the Reynolds site. (See Appendix 6).

2.7.3 Storm Sewer

Storm sewer servicing was not addressed by any of the studies done to-date. The Al-Terra report, in reviewing the transportation requirements of Highway 13, briefly mentioned the possible construction of a storm sewer for the museum and roadway draining to an off-site parkway.

The cost of $630,000 would probably only service the museum site into the roadway but would be oversized to accommodate adjacent lanes along Highway 13 that will also be serviced with the proposed sanitary sewer system.

2.7.4 Transportation

The Reynolds Museum will significantly impact Highway 13 West, particularly the section form the City to the Museum. Considerable demand for commercial development could result on this section of roadway if servicing is ultimately provided to the area. To control and facilitate planning and development, the City of Wetaskiwin initiated a Functional Planning Study to identify design constraints and prepare preliminary design and cost estimates.

The following assumptions were made to help with the Functional Plan:

- a strip of land immediately adjacent to and fronting on Highway 13 will be designated for highway commercial use.
- access to Highway 13 will be provided at existing road allowance and at intermediate locations to prove approximate 400m spacing between intersections.
- access to the Reynolds-Alberta Museum will be aligned with the existing access at the County of Wetaskiwin Administration Office.
- a ten meter wide utility right-of-way will be acquired on each side of the existing road right-of-way for roadway widening and for extension of water and sewer services to the Reynolds-Alberta Museum and beyond.
- a twenty metre wide right-of-way be protected on each side of the roadway for future provision of fronting service roads.

The roadway is proposed to be designed to a four lane divided urban arterial for 1600 metres west of Highway 2A (West Boundary of the S.E. 1/4 of Section 16-46-24-4). West of this point, a four lane divided rural cross-section with a raised median is proposed to approximately 500 metre west of the Museum entrance where the road will transition back to the existing two lane rural roadway. (Highway 13 West - Highway 2A to Reynolds Museum Functional Planning Study, Al-Terra Engineering Ltd., February 1989). Cost is estimated at $3.9 million.

In summary, a total cost of over $11.2 million will be incurred to provide functional services to the Reynolds-Alberta Museum site. With proper planning and phased development the site servicing can be maximized over several years.

2.8 COMMERCIAL DEVELOPMENT AREAS

The Commercial districts of Wetaskiwin and to some degree those in surrounding communities contain the bulk of commercial service and retail development that will cater to the needs of the travelling public. For those communities that will attract visitation as a result of providing accommodation or attractions, the commercial operations located in all districts will benefit. However, for those communities that only cater to the needs of the "pass through" market, the benefit accrued to these communities will be directed mainly at the visible "highway commercial" districts that maximize highway exposure and serve the motoring public.

2.8.1 Wetaskiwin

The City of Wetaskiwin commercial districts are best defined by the City's General Municipal Plan By-Law No. 1058-87 and Land Use By-Law No. 1095-88. Those districts that will cater to tourists are mainly the neighbourhood commercial, central commercial shopping centre and highway commercial area.

In Wetaskiwin, the majority of the existing commercial land use is located along Highway 2A (56th Street) between 56th Avenue and just south of Highway 13 (Highway Commercial), and in the central business district along 50th Avenue and 51st Street extending from 53rd Street east to the railway and on the east side of the railway to 48th Street (Central Commercial). It also appears that a second commercial node is emerging in the vicinity of the junction of Highways 2A and 13. The Wetaskiwin Mall just to the south of the junction and the expanding trading area to the West and South, along with the Museum development on Highway 13, will continue to support this trend. (Discussion with Mr. Bob Botham, Director, BRRPC - Wetaskiwin, February, 1989).

Although extensive undeveloped commercial lands along Highway 2A are limited, the City hopes to direct its commercial development to infill areas south of 56th Avenue and north of Highway 13. Highway Commercial uses will also be allowed south of Highway 13 in addition to central commercial uses. The attached Appendix 7 covers the permitted and discretionary uses by specified land use district.

In summary, much of the "Auto Mile" area along Highway 2A is presently an attractive business location for highway oriented operations such as service stations, motels, drive-in/fast food restaurants and vehicle or R.V. repair. The Central Commercial district or newly developing areas should attract businesses that do not require traffic exposure along valuable highway property and that are more pedestrian oriented.

2.8.2 Other Areas and Communities

It is evident that certain commercial or recreational ventures may not be appropriately located within the existing boundary of Wetaskiwin. Existing planning policies, available contiguous land areas and transportation factors dictate that new and especially extensive land users should locate where land or exposure or amenities are more readily available. These uses however, will be limited by municipal servicing. In cases where it is cost effective and appropriate to provide on-site servicing such as well and septic, the development can be economically viable. Some of these uses could include golf courses, theme parks, R.V. and campgrounds, cottage/cabin rental resort, etc. It is expected that much of this type of development should occur outside the urban centres but in close proximity to local services. Along some of the main arterials and in natural areas within the region of influence should be considered.

2.9 SUMMARY OF INVENTORY

The anticipated surge in visitation created by the R.A.M. will generate an increase in need for accommodation, both fixed-roof and nonfixed-roof, dining and beverage facilities, meeting and reception halls, recreation areas and facilities, other attractions, and general tourist services and retail. It is clear that the region has a basic supply of these tourism assets but improvements to the present stock will be required.

Although the region has over 2,000 hotel/motel units (over 3,500 if Red Deer is included), the supply in close proximity to Wetaskiwin is limited and the quality is only medium to low. The availability of other forms of fixed-roof accommodation such as lodges and cabins is very limited and already in demand by tourists from the larger centres of Edmonton and Calgary. Guest ranches have increased in the region but assistance to the operators is required in such areas as marketing. Bed and Breakfast operations are limited in the region; opportunities for more should be investigated, especially within the farming communities, smaller centres near Wetaskiwin, and in Wetaskiwin itself.

The region has over 3,500 campground sites for summer use. Most are located near the smaller communities or adjacent to the local lakes and are operated by the Province, local clubs or private business. There are opportunities for more fully serviced sites either near Wetaskiwin or on water bodies with associated recreation.

The selection of dining establishments is limited to fast food and cafes along many of the highways in the region. Wetaskiwin itself has approximately 35 restaurants but only five can be considered fine dining and the remainder are fast food regular dining spots. The opportunity exists for more fine dining and an expansion of the capacity in Wetaskiwin. Meeting and reception facilities will also be required to support any major functions in Wetaskiwin. The present supply is limited in space and capacity and booked well in advance of peak periods of use.

The natural areas and recreational facilities are concentrated around water bodies in the region. Prime outdoor recreation and resort opportunities exist on some of the many freshwater lakes. Although many of the existing recreational lands and facilities are run by government, the private sector should be encouraged to invest in and develop their own unique and modern facilities.

Extensive retail services and facilities will be required to cater to the new museum market. Although the Wetaskiwin area is presently served by a variety of businesses, the amount and quality must be addressed. Specialty retail and service must be added to the Wetaskiwin commercial base. **The services and businesses should consider seasonal needs, specialty products, and generally new marketing approaches.**

The inventory of attractions is quite limited to date. **In order for tourists visiting the R.A.M., other local "draws" will be required to keep the tourists from leaving immediately after they visit the Museum.** If proposed major attractions are developed in the area, more recognized events are scheduled and each are promoted effectively, the tourism impact will be greater as a result of this added appeal.

The infrastructure required to support new growth and visitation provides substantial development opportunity especially in Wetaskiwin. Several options exist as a result of proposed new municipal servicing, land areas and traffic patterns. Where commercial or recreational operations can not be located within the City, other areas in the region should be considered. In each case, however, the development should maximize its linkages and market requirements.

MARKET ASSESSMENT

3.0 MARKET ASSESSMENT

3.1 MARKET OVERVIEW

The tourism market for the Reynolds-Alberta Museum will be essentially the same as that of similar Alberta Cultural/Historical facilities over the first two years of its operation. The forecast annual visitation by Alberta Culture for the Reynolds-Alberta Museum is 250,000 for its first two years of operation. Based on the results experienced by facilities such as the Tyrell Museum, Head-Smashed-In Buffalo Jump, and the Frank Slide Interpretive Centre, and because of the proximity to Edmonton, this forecast is conservative and the annual visitation may exceed 300,000 during the same two years. This figure assumes that the level of marketing and promotion for the Reynolds-Alberta Museum will be at least similar to that done for the Tyrell Museum. The market for attractions of this nature has been growing steadily over the past few years as a result of more emphasis being placed on family recreation.

3.2 MARKET PROFILE AND SEGMENTATION

The market profile and segmentation assumed for the Reynolds-Alberta Museum is based on the visitor profile for other Alberta Cultural/Historical attractions as well as those located elsewhere in Canada and the United States. The profiles experienced at all facilities were noticeably similar.

3.2.1 Origin

The resident origin of the typical tourist visitor to the Reynolds-Alberta Museum is estimated to be as follows:

	Percentage of Market Share	Category
1.	5%	Alberta residents living within 50 Km of Reynolds-Alberta Museum
2.	45%	Alberta residents living over 50 Km from the Reynolds-Alberta Museum

3.	19%	Western Canadian residents other than Alberta
4.	13%	Eastern Canadian residents
5.	8%	United States residents
6.	10%	Off-shore residents

The above profile would indicate an opportunity for overnight visitation to the area from the last five categories which represent 95% of the total expected visitation. This opportunity will be largely dependant on an expanded appeal for the areas other than the Reynolds-Alberta Museum. This appeal will be derived from the development of additional recreational facilities, and attractions, tourism class accommodation, appealing dining facilities and interesting shops and boutiques. If this dimension is not added to the area, visitors will stay overnight in Edmonton, Red Deer, or Calgary. It should also be noted that a large portion of the second category will be Edmonton residents that will be largely day visitors. Again, added appeal is extremely important to keep this segment of the market in Wetaskiwin longer than three or four hours or overnight.

3.2.2 Demographics

The approximate demographics of the typical visitor of the Reynolds-Alberta Museum during the first two years of operation is expected to be as follows:

- 75% will be first time visitors to the museum
- The majority will spend less than three hours at the museum site
- 80% will visit the museum again (proximity to Edmonton)
- The majority of visitors will be family groups of two to five (2 - 5) people
- School and club groups will comprise 17% of total visitation
- 50% of visitors will be under the age of 35
- 12% of visitors will be senior citizens
- 60% will be day visitors (unless added appeal is developed in the immediate area)
- 20% will be overnight campers
- 20% will be hotel/motel patrons
- The average day visitor will spend $10.00 - $15.00 in the area
- The average overnight camper will spend about $20.00 - $30.00 in the area per day

o The average hotel/motel patron will spend $50.00 - $75.00 per day in the area.

This demographic profile has been extrapolated from similar museums and historic site file information including the recent (June - July, 1988) visitor survey for Tyrell, conducted by Alberta Culture and Multiculturalism.

3.3 ANTICIPATED DEMANDS

The anticipated demands of tourists attracted to the Reynolds-Alberta Museum will be essentially the same as any other tourist attraction. Overnight hotel/motel visitors will need clean, comfortable, attractive accommodation. It is anticipated that approximately 200 additional hotel/motel rooms/units need to be developed in the immediate area to handle forecast demand. If added appeal is generated in this area, additional rooms above this figure will be needed. Part of this demand can be expected to be met by cabin and other fixed-roof accommodations. It is anticipated that 250 new campsites will be needed to accommodate anticipated camper demands. (The means of deriving these calculations were based on an annual visitation of 300,000).[2]

It is anticipated that a minimum of 50 additional fine dining and 150 family dining restaurant seats (this could include some fast food) need to be added to the areas to accommodate forecast demand. This projection is based on the fact that the supply of fine dining seats is very limited and that any new establishments would be of a quality superior to the existing stock. It is recommended that new restaurant operations select strong themes, design and decor that will intrigue tourists to dine locally, not just serve as another facility in which to eat.

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[2] Calculations for additional accommodation:
20% projected overnight patrons = 60,000
75% projected visitation during May - September = 45,000
or 22,500 roomnights @ 2 per room.
65% projected visitation over a Fri/Sat/Sun = 14,625 roomnights
14,625
60 (20 weekends x 3 nights) = 244 rooms needed to accommodate demand (Rounded at 250).
Assume 50 rooms are presently suitable (250 - 50 = 200 additional units is anticipated need). Additional campsite requirement was calculated in a similar fashion.

There will also be proportionate increases in the demand for other tourist related goods and services. It is not anticipated that significant retail development is required to meet the needs of the incremental visitation expected, but quality items and services mentioned in Section 2 should be considered.

ECONOMIC IMPACT ASSESSMENT

4.0 ECONOMIC IMPACT ASSESSMENT

The development and operation of the Reynolds-Alberta Museum will have a significant impact upon both the local and regional economy, and the economy of the province as a whole. For the purposes of this analysis, however, the economic impact assessment has been restricted to the local Wetaskiwin area. Geographically this can be considered consistent with the local market area for the museum, including an area within approximately a 50 Km radius of Wetaskiwin. It is also implied here that any new growth that occurs as a direct result of the museum will be within the Wetaskiwin region.

The economic impact estimated for this study includes both the direct expenditure and employment impacts of the museum, as well as the indirect and induced economic impacts. Indirect impacts refer to the downstream expenditure and employment impacts associated with the purchase of raw materials and other inputs to the production. Induced impacts result from the income generated by the expenditure of additional income generated on other goods and services within the economy. The indirect and induced impacts have been estimated using a multiplier analysis based on the appropriate multipliers in the "Economic Multipliers for Alberta Industries and Commodities" (Alberta Bureau of Statistics) and general approach to estimating economic impacts described in the "Local Economic Impact Model for Heritage Facilities" (Alberta Culture and Multiculturalism Historical Resources).

The economic impact on the local area will be generated by three major factors: the development and operation of the museum; the incremental tourism impacts (i.e. those related to additional tourist visits to the study area resulting from the operation of the museum) on the local economy; and, the impact associated with other development in the Wetaskiwin area directly related to the museum. Each of these are described below.

4.1 MUSEUM IMPACTS

The development of the Reynolds-Alberta Museum will have a direct impact on the local Wetaskiwin economy. This will include both the impacts resulting from the construction of the facility and its on-going operation.

Construction Impacts

The total cost of constructing the museum facility is estimated to be approximately $30 million. Of this total, it is estimated that approximately 30 percent ($9 million) will be spent locally on materials and labor directly employed during construction. It is estimated that the total income impact of construction will be approximately $13.9 million which will occur over the three (3) year construction period scheduled for 1989-1992. In addition, construction of the facilities will have created approximately 110 person-years of employment and an additional $3.3 million of household income over the same period.

Operating Impacts

The operation of the museum is anticipated to inject approximately $1.4 million per year in the local Wetaskiwin area economy on labor, materials and supplies. The operation of the museum will have an on-going impact on the local economy, estimated to be approximately $2.2 million annually (1989 dollars). This will produce an estimated 50 person years of employment per year.

4.2 TOURISM IMPACTS

The local Wetaskiwin economy will receive a significant on-going increase in economic activity as a result of the incremental tourist visitation resulting from the museum. Incremental tourist activity is defined for this analysis as tourist visits to the study area resulting directly from the operation of the museum which would not have otherwise occurred. As discussed in Section 3, total annual attendance is estimated at 300,000. This total is comprised of mostly day visitors, estimated to be 62 percent. However, there is also a substantial portion of visitors who will stay in the region and utilize either fixed roof or non-fixed roof accommodation/facilities, estimated to be 38 percent of total visits. Estimated incremental tourist visitation is disaggregated by type of visitor and origin in Table 8 below.

TABLE 8

Incremental Tourist Visitation

Museum Visitor Days	**Day Visit**	**Fixed-Roof**	**Nonfixed-Roof**	**Total**
Local	15,000	0	0	15,00
Other Alberta	81,000	27,000	27,000	135,000
Western Canada	33,000	12,000	12,000	57,000
Eastern Canada	24,000	7,500	7,500	39,000
United States	14,400	4,800	4,800	24,000
Off-Shore	18,000	6,000	6,000	30,000
Total	**185,400**	**57,300**	**57,300**	**300,000**

Daily expenditures have been estimated for each type of visitor and broken down by expenditure type in the Table 10. Total tourist visitation impacts have been estimated by utilizing a local propensity to consume and proportion of locally retained expenditure factor of 45 percent and 40 percent respectively.

TABLE 9

Tourist Daily Expenditures

Expenditures/ Visitor Days	**Day Visit**	**Fixed-Roof**	**Nonfixed-Roof**
Retail	$2.00	$5.00	$8.00
Accommodation	$0.00	$25.00	$3.00
Transportation	$4.00	$7.00	$6.00
Food Service	$5.00	$20.00	$4.00
Other	$1.00	$8.00	$4.00
Total	**$12.00**	**$65.00**	**$25.00**

The total local income impact of incremental tourist expenditures in the study area is estimated at $4.5 million annually (1989 dollars). This includes the creation of approximately 60 person years of employment and approximately $800,000 of household income.

4.3 OTHER RELATED DEVELOPMENT IMPACTS

In addition to the museum operation and tourist related impacts, the local economy will benefit from an anticipated increase in primarily tourist related developments. As discussed in Section 3, an increase of 200 hotel/motel units, 250 new campsite units and 200 dining/restaurant seats will be required to meet the expected demand. This development represents an estimated $5.5 million of investment which is expected to occur during or shortly after construction of the museum.

This incremental development will result in an increase of approximately $6.1 million of income to the local Wetaskiwin region during the construction of the facilities. The associated employment and household income impacts will total 200 person years and $2.5 million respectively.

It should be noted that the on-going operating impacts associated with the museum related incremental tourism impacts have been included in the tourism impacts discussed above. Further, it has been assumed that all local municipal development costs associated with this development and the development of the museum will be recovered in a manner which is revenue neutral to the region and thus does not represent incremental economic activity.

Finally, it should be recognized that this analysis does not include the possible impacts which may result from the development of other major tourism attractions in the study area. Significant potential for the development of other complimentary tourism related attractions exists for the study area which can enhance the visitation and economic impact relevant to the museum. The extent and type of this impact depend upon a number of factors including: the type of attraction; its location relative to Wetaskiwin and RAM; and, the degree to which it can be integrated into the existing tourist infrastructure in the area.

4.4 SUMMARY OF ECONOMIC IMPACTS

The development and operation of the Reynolds-Alberta Museum in Wetaskiwin will have a significant and lasting impact upon the local regional economy. The development impacts resulting from the construction of the museum and the associated tourism infrastructure discussed above will generate an estimated $20.0 million of gross output and 310 person-years of employment. These impacts will occur during the museum construction period of 1989 to 1992 and beyond 1992 during which some of the tourism related infrastructure can be expected to be developed. These impacts are transitory and will be limited to the general timeframes outlined above.

The museum will also have on-going impacts to the local region associated with the operation of the museum and the incremental tourism activity generated for the region. These impacts are estimated to total $6.7 million of gross output and 110 person-years of employment annually. These impacts will be generated upon commencement of operation and can be expected to continue during the tenure of RAM operations. As discussed above, it should be noted that the development of other major tourism attractions in the area can have additional positive economic impacts on the region which are not included in this analysis.

TOURISM DEVELOPMENT OPPORTUNITIES

5.0 TOURISM DEVELOPMENT OPPORTUNITIES

The preceeding assessments allow us to conclude that the Reynolds-Alberta Museum, over the long term, will have a net positive economic impact on Wetaskiwin, the surrounding region and the province. The direct benefit, however will accrue mainly to Wetaskiwin and a surrounding area of approximately 50 Km. Using a projected visitation of 300,000 persons per year and quantifying this partially incremental market to Wetaskiwin, it is anticipated that certain new services and facilities will be required to cater to this new market.

It is also anticipated that the greater the services and appeal provided in Wetaskiwin and immediate area, the more potential there will be of keeping the visitors in the area for an extended period, and avoiding loss to Edmonton, Red Deer or other centres outside of the region. The inventory of available services also helped discern that certain key tourism amenities and services are not available or will not suffice after the Museum becomes operational. Nevertheless, a sound infrastructure of municipal utilities and commercial lands will allow for new development and complement the existing base of tourism services and attractions.

5.1 PRODUCT AND SERVICE ASSESSMENT

Three key tourism areas were identified in this exercise that must be addressed in order to maximize the benefit of the new generator. They are as follows:

- **Accommodations: fixed and non-fixed roof.**
- **Retail: food and beverage and specialty retail.**
- **Attractions: major recreation, amusement or resort complex that would have an "attraction" component.**

Besides the estimated requirement for an additional 200 units of fixed-roof accommodation, there is a significant need for better quality accommodation than is the present norm in the region. This could include the provision of some accommodation with indoor pools, room service, dining facilities, large meeting facilities and an overall 2 to 4 star facility rating. Other fixed-roof units could include rental cabins in an aesthetically appealing natural setting. The demand for this type of accommodation is quite high in the Battle River Tourist Zone, as reported by zone officials. Affiliation with guest ranches or bed breakfast operations should be investigated. Nonfixed roof accommodation should entail some full-service (power, water, sewer) camping sites at strategic locations near Wetaskiwin, in the natural areas and near water bodies to service recreational vehicles and long-term stay overnight camping. Expansion of any existing facilities should be encouraged when appropriate.

Although Wetaskiwin has an extensive array of food and beverage establishments, there is a requirement for more quality family-dining. Fast food restaurants are most appropriate for the day visitor, but not conducive to the long term stay visitor market and out-of-province or international visitor. A night club and pubs are also required in Wetaskiwin.

Special retail areas are particularly required to serve the travelling public, out-of-town tourist and special item shopper. This market has never developed in the Wetaskiwin area because of the lack of national and international markets. Arts and crafts, specialty foods, clothing, and wines are some of the many business opportunities to be investigated. This should not preclude entrepreneurs from also considering special items and ventures that will serve the day visitor. Such ventures could include road side ice cream stands, outdoor cafes/pubs, street vending for snack foods, outdoor arts and crafts sales, farmer's markets and even a horse-drawn carriage service.

Since Wetaskiwin is so close to a major city with its many attractions, other recreational developments should be considered to keep the museum visitors from coming out for only three (3) hours or part of a day. Amusement parks, expanded golf facilities or a resort complex that can entertain visitors with a theme development or series of recreational items could be considered in close proximity to Wetaskiwin.

5.2 DEVELOPMENT SCENARIOS

As a result of the above noted assessment, four development scenarios were considered for Wetaskiwin and area (See Figure 8, 9, 10 and 11). Each of these takes into consideration the anticipated market demand and the community requirements to maximize the impact of the Reynolds-Alberta Museum. Each scenario has benefits and some disadvantages associated with each element. The four scenarios are as follows:

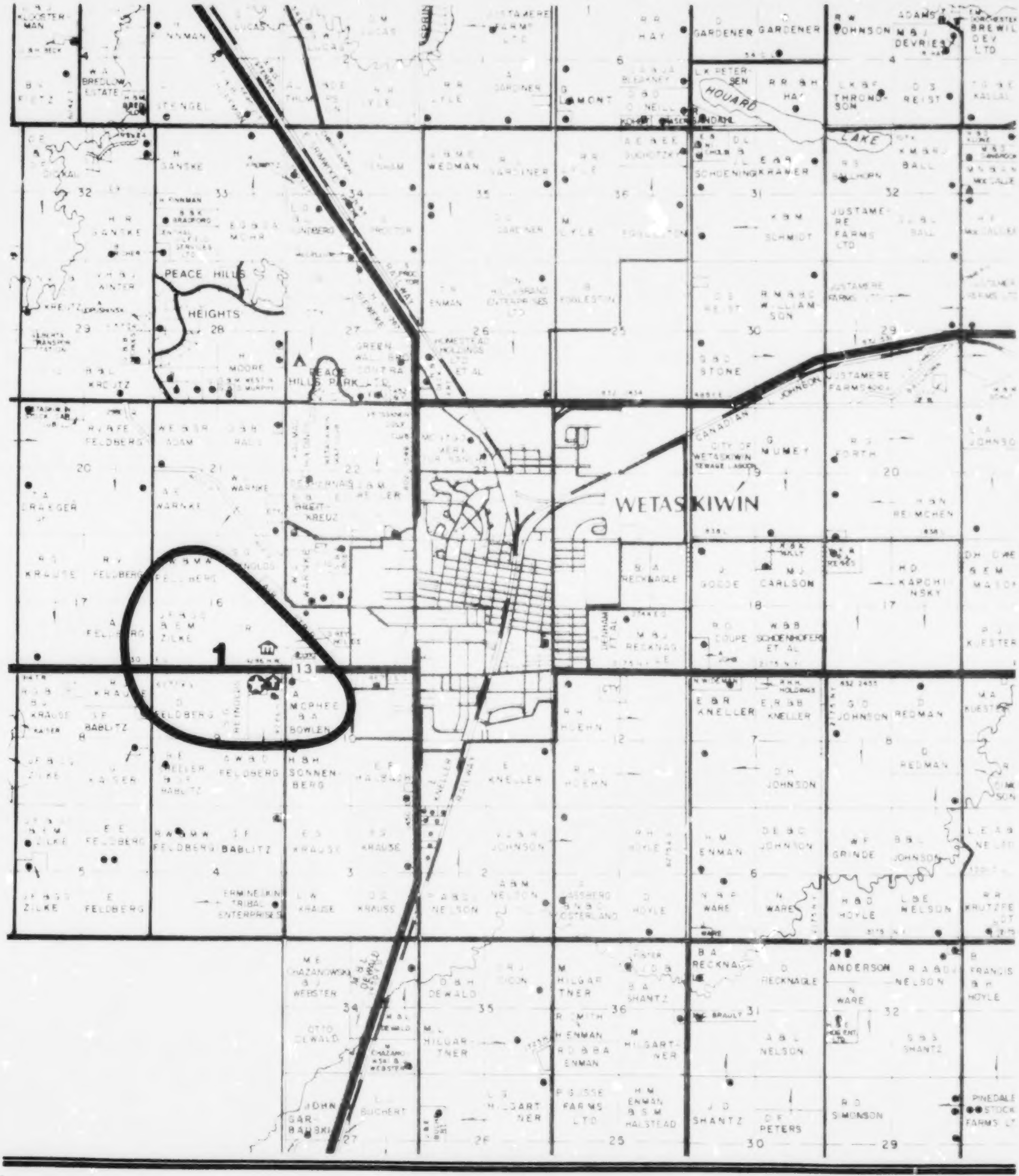
5.2.1 SCENARIO 1 - Major resort complex located west of Wetaskiwin.

Description: Scenario 1 suggests that several tourist requirements that will ultimately be developed in Wetaskiwin can be located at a site west of Highway 2A. This scenario is expected to capitalize on such significant attributes of the area as Highway 13 (west), utility services. Of particular significance in this approach is the proximity to the R.A.M. This scenario assumes that a single resort complex can include many facilities and tourist services and even provide a incremental tourist generator for the City.

This complex could provide:

- Accommodation requirements - a lodge or quality hotel with at least 50 rooms
- An 18 hole grass green golf course with high quality club house, food service, lounge and pro shop with rentals
- A fine dining restaurant with at least 40 seats
- Indoor pool and or aquatic (waterslide) facilities affiliated with exercise and spa facilities
- Tennis courts/racquet courts
- Optional recreational vehicle full service campsite designed to complement the golf course or other outdoor recreational area.

(See Figure 8)


WETASKIWIN
PEACE HILLS HEIGHTS
PEACE HILLS PARK
HOUARD LAKE
CANADIAN NATIONAL
1
13

IMC Consulting Group Inc.

① Resort Complex West of City

Figure 8

DEVELOPMENT SCENARIO #1

The benefits and concerns related to Scenario 1 are:

BENEFITS	**CONCERNS**
o Take advantage of and mitigate $11.2 million servicing costs to museum site (facility would have to fall within or close to servicing area) o Maximum exposure along Highway 13 o Maximum exposure and proximity to Reynolds-Alberta Museum o Substantial space for expansion o Does not create problems with congestion in city core or other commercial district o Allows for an "attraction component" to supplement the Reynolds-Alberta Museum	o Cost of service is incremental to cost of serviced area if beyond the Reynolds site o Visitors will be provided with substantial service at that end of the City and may therefore not proceed onto the central business district o Influence on theme and character of the Reynolds-Alberta Museum may be detrimental if site planning and design are not conducive to R.A.M. o Other areas may be more conducive to particular elements of the resort, ie. golf courses, natural area development etc. o Certain lands will fall within the "Airport Vicinity Protection Area"

5.2.2 SCENARIO 2 - Major Resort east or north of Wetaskiwin

(Similar elements to Scenario 1)

Description: Scenario 2 also assumes a single resort complex containing various types of tourist services and attractions. The essential difference between this option and Scenario 1 is the location. Scenario 2 considers a location at the north end of the City which could take advantage of exposures along Highway 2A or Highway 13 (east). The significant value to note for this scenario is the ability to pull visitors through the city and maximize expenditure within the existing business community. However, if this intention is to be realized, the proposed resort complex must have an attraction component that can draw visitors from the R.A.M. site and back up Highway 2A. The business community must also contribute to this scenario by effective marketing and strategic planning.

(See Figure 9)

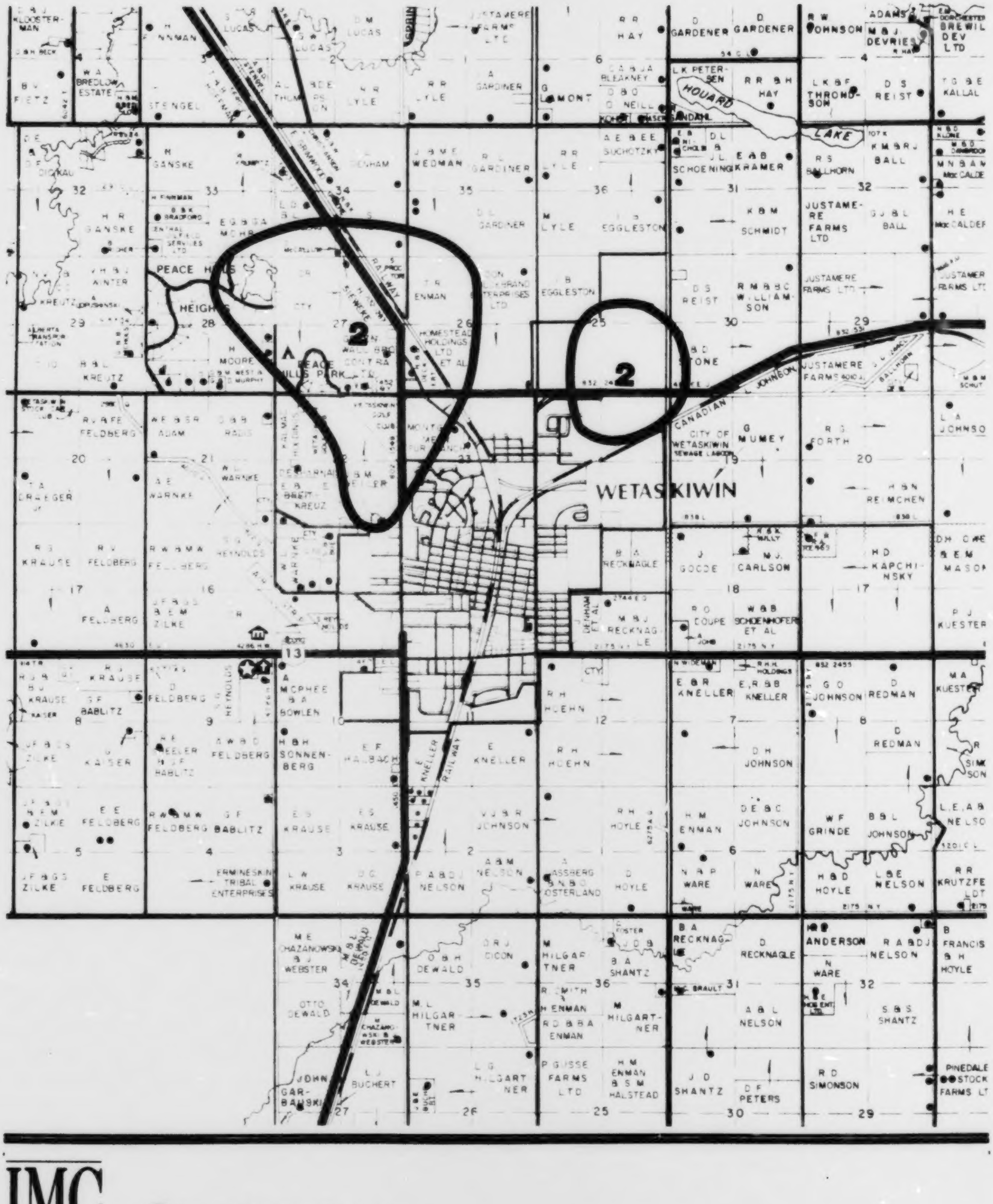
The benefits and concerns related to Scenario 2 are:

BENEFITS

- Linkage to prime existing recreational areas such as Wetaskiwin Golf Course
- City owned property
- Substantial ability to pull visitors through city and maximize expenditure within business community.
- Extension of off-site servicing to the north end of city may be negligible
- Maximize exposure along 2A and/or 13E

CONCERNS

- Lack of immediate market generated by Reynolds-Alberta Museum
- No mitigation or maximization of $11.2 million servicing expenditure on the southwest corner of the city
- Depending on location, there may be land tenure problems
- Depending on location, there may be more servicing costs to be borne by the City
- Traffic congestion along Highways 13 and 2A from the museum site to the new destination


WETASKIWIN
2
2
HOUARD LAKE
CANADIAN RAILWAY
PEACE HILLS HEIGHTS
13

IMC Consulting Group Inc.

② Resort North or East of City

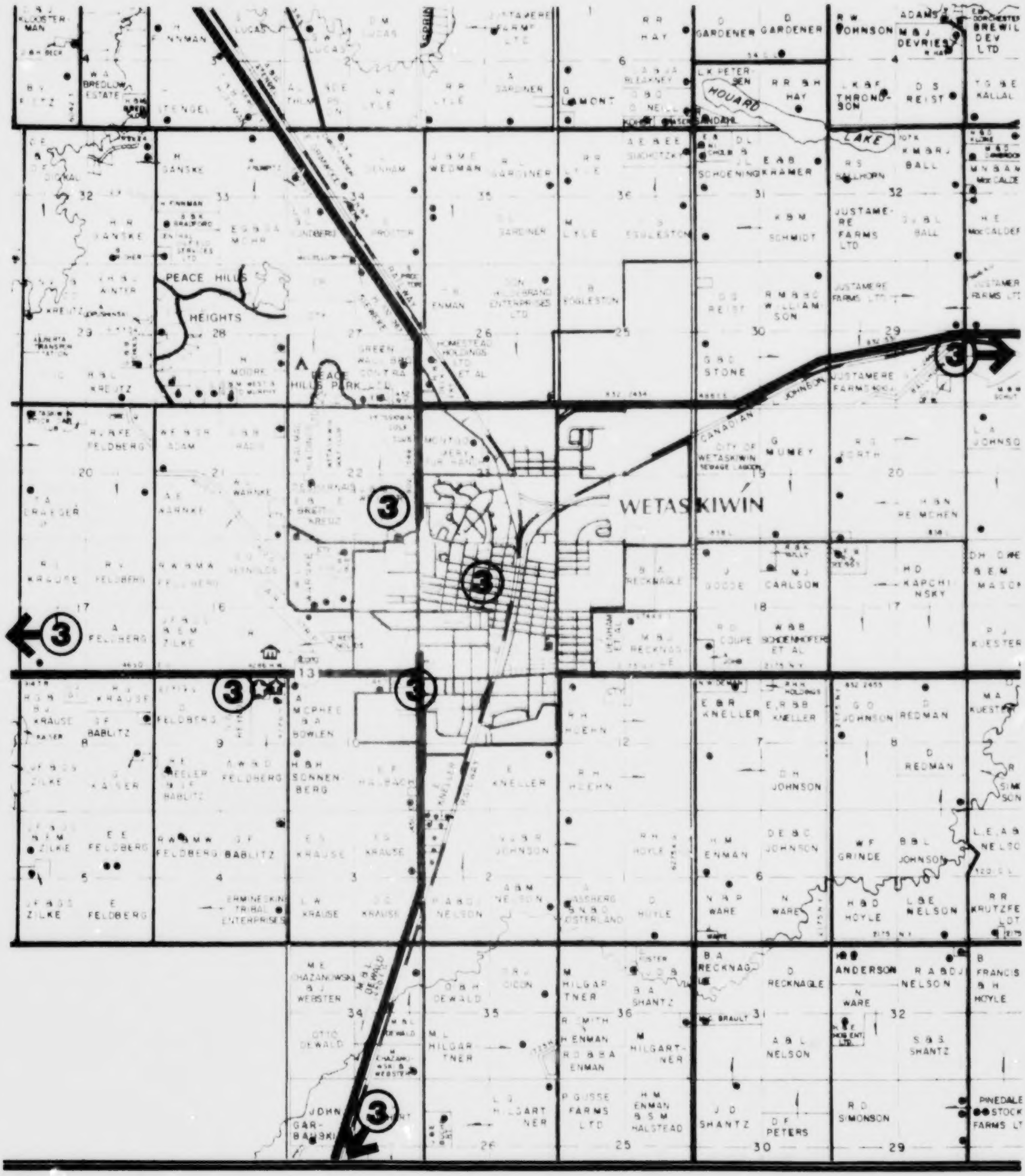
Figure 9
DEVELOPMENT SCENARIO #2

5.2.3 SCENARIO 3 - Tourism Services located throughout the City and surrounding region

Description: This scenario assumes that it will be in the developer's best interest to locate new facilities or services at prime locations in the region so that each will benefit from necessary linkages and market requirements. This option will include possible developments that occur on vacant lands within the city, on the outskirts, and in the natural areas or near the water bodies for enhanced outdoor recreation opportunities and an added dimension to the area's tourism products. For analysis purposes this scenario entails the following:

- Cabin/cottage resort complex on a prime water body such as Pigeon Lake, Buffalo Lake or Buck Lake, with a marina component.
- A hotel development near the junction of Highways 2A and 13 West.
- A full-service campground/r.v. site and hiking/trail system or amusement park (theme in keeping with Museum character) near the Reynolds-Alberta Museum site or to the north of Wetaskiwin.
- An expanded Wetaskiwin Golf Course at the north end of the City - 27 or 36 holes and more elaborate golf course facilities.
- Fine dining restaurant, specialty retail and meeting/convention complex in the heart of downtown Wetaskiwin. Land assembly may be necessary but it should be strategically located, (old hospital site should be investigated).

(See Figure 10)


WETASKIWIN
PEACE HILLS
HEIGHTS
PEACE HILLS PARK
HOUARD LAKE
CITY OF WETASKIWIN SEWAGE LAGOON
CANADIAN PACIFIC RAILWAY
13
③
③
③
③
③
③
③
③
JUSTAMERE FARMS LTD
PINEDALE STOCK FARMS LTD
ERMINESKIN TRIBAL ENTERPRISES
GREEN WALL BROS CONTRA
HOMESTEAD HOLDINGS LTD ET AL

IMC
Consulting
Group Inc.

③ Service & Attractions Distributed Throughout City & Region

Figure 10
DEVELOPMENT SCENARIO #3

The benefits and concerns related to Scenario 3 are:

BENEFITS	CONCERNS
o New regional tourism product located near the water bodies or in natural areas	o The nodal concentration element is lost by distributing the development
o Infill of commercial lands	o Servicing costs to the Reynolds-Alberta Museum site may not be mitigated
o Civic and downtown revitalization products and initiatives	o New off-site costs may be incurred
o Use of existing servicing capacity or proposed new servicing to the west of city (ie. for hotel complex at 13 and 2A)	o Alberta Culture will be very concerned about any non-fixed roof accommodation and any recreational development that occurs near the museum as it may impact on the character of the R.A.M. site.
o Maximization of existing development such as the golf course or the campground facilities at Wetaskiwin.	

5.2.4 SCENARIO 4 - Cluster Concept

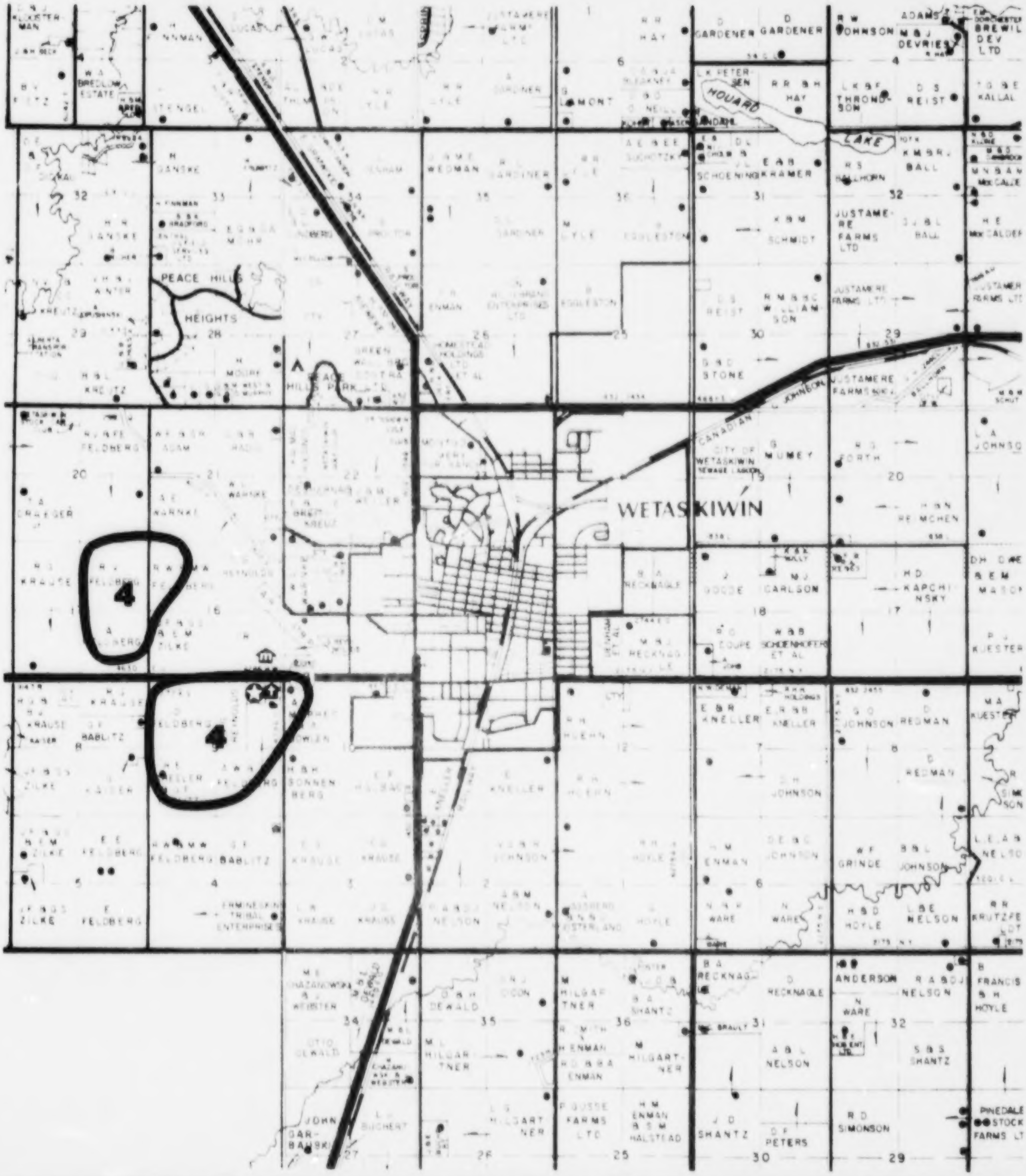
Description: Scenario 4 recognizes the merits of clustering various tourism services and activities at locations that allow for linkages with proposed or existing developments. Firstly, it is the intent of this scenario to capitalize on and support the visitation of a major tourism generator by locating several tourism services, facilities and attractions in close proximity to the museum. Furthermore, this scenario takes into consideration that several services are already in place in Wetaskiwin and area, and therefore seeks not to duplicate a service if not required. Lastly, the "cluster concept" calls for a concentration of land uses around the museum that can be physically linked to existing and proposed recreational and civic developments.

The two main components of scenario 4 are:

1. **Tourism Services/Attractions Clusters**
2. **Recreation and Civic Developments**

The tourism service/attraction component forms two clusters, one of which is located to the south of the museum along Highway 13, and another cluster which is located on the remaining quarter-sections of 16 (46-24-4) to the west and north of the museum site. (See Figure 11).

Other components of this scenario include: (i) creating an "urban park" on the outskirts between the airport and the golf course; (ii) expanding the existing golf course; and (iii) emphasizing the commercial district and other attractions already available in Wetaskiwin. (See Figure 12).

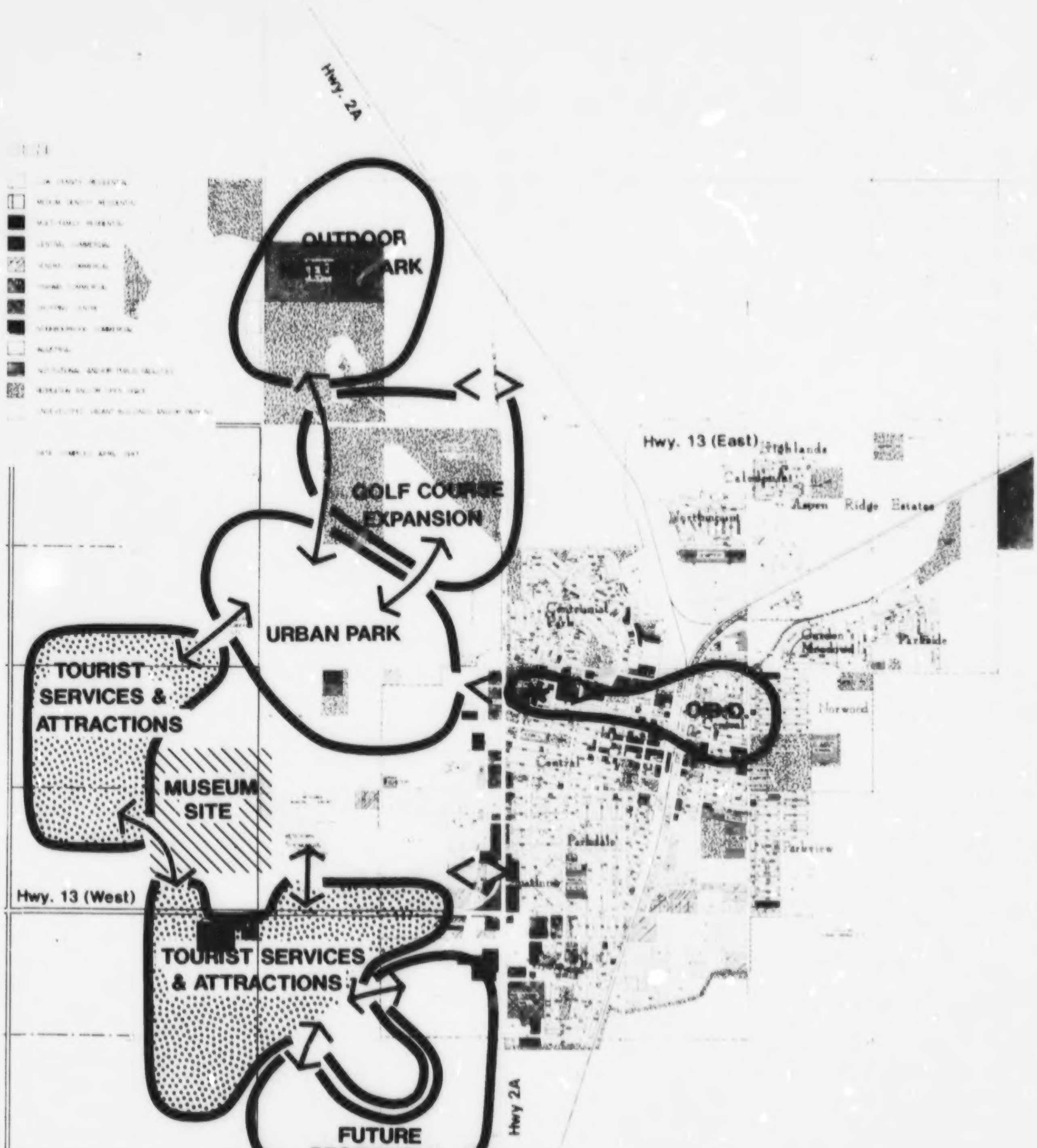

WETASKIWIN
PEACE HILLS
HEIGHTS
PEACE HILLS PARK
HOUARD LAKE
CITY OF WETASKIWIN SEWAGE LAGOON
CANADIAN
JOHNSON
4
4

IMC
Consulting
Group Inc.

④ Cluster Concept

Figure 11

DEVELOPMENT SCENARIO #4


Hwy. 2A
OUTDOOR NATURE PARK
GOLF COURSE EXPANSION
URBAN PARK
TOURIST SERVICES & ATTRACTIONS
MUSEUM SITE
Hwy. 13 (West)
TOURIST SERVICES & ATTRACTIONS
FUTURE RESIDENTIAL
Hwy 2A
Hwy. 13 (East)
Highlands
Aspen Ridge Estates
Centennial Park
Parkside
Norwood
C.B.D.
Central
Parkdale
Parkview

IMC
Consulting
Group Inc.

<> Feature Access Area

* Community Theme Focal Point

Figure 12

SCENARIO # 4
CLUSTER DEVELOPMENT
CONCEPT LINKAGES

The benefits and concerns related to Scenario 4 are:

BENEFITS

- Maximize servicing costs (facilities fall within servicing area)
- Maximum exposure for services is possible
- Space for expansion
- Allows for "attraction component"
- Allows for linkages with proposed and existing developments
- Helps avoid duplication of existing services
- Enhances potential for expansion or improvements to other community initiatives

CONCERNS

- Cost of servicing is incremental to cost of serviced area if beyond the Reynolds site
- Area Structure Plan must be in keeping with intent of R.A.M. and other proposed developments on west side of city
- Expansion to the west of city boundary must be weighted with development potential in other parts of Wetaskiwin

Scenario 4 is described in some detail to provide an example of how the various elements of a concept can be implemented. It should be noted that several of the following implementation measures will also apply to the other scenarios.

POTENTIAL ELEMENTS OF THE CLUSTERS

Tourism Services

It is anticipated that the tourism services will be required by the museum's day visitors, motoring public and tourists with an interest to stay in Wetaskiwin overnight.

The following list of potential elements is provided for an entrepreneur's scrutiny:

- Accommodation - a lodge or quality hotel with at least 100 rooms. (A theme park could complement this and other elements in design or through marketing.)
- Accommodation - a motel/cabin rental units.
- A par-3 golf course and club house facilities (potential for residential development along fairways).
- A practice/driving range to complement the par-3 golf course.
- Tennis courts/racquet courts.
- Information centre (theme approach).
- R.V. camping with full service hook-ups (with convenience store).
- Park and ride (overflow parking for major events).
- Tour bus/shuttle service depot (to be combined with bike rentals, horse and carriage pick up, auto rental, and/or taxi stand).
- Theme restaurant/pub.
- Fine dining restaurant included in hotel or free standing.
- Bike/hiking/ski trails linking all elements together and linking the area to other features nearby.
- Gas bar/convenience store.

Tourism Attractions

Tourism attractions are recommended as a complementary development to the Museum site. A large land area is available immediately adjacent to the west and north of where Alberta Culture and Multiculturism has planned to locate outdoor for outdoor oriented recreational activities, amusements and other major area attractions. It is also recommended that the proposed urban park concept between the airport and the golf course be linked to the many attractions and services by a walking and bicycle trail system and by proper planning and design. Some of the many attractions suggested, include the following:

o	Outdoor event grounds with concession.
o	Amphitheatre/band shell.
o	Children's amusement park.
o	Go-kart track, tots "race way".
o	BMX track (with unique topographic features built in).
o	Outdoor skating rink.
o	Snowmobile track.
o	Waterslide park.
o	Funland.
o	Farmers market.
o	Picnic sites.
o	Native Tipi village (White Buffalo Society Plans).
o	Extension of Museum's historical park.

THE CLUSTER CONCEPT IN CONTEXT OF WETASKIWIN

In order for this scenario to be most effective for the City of Wetaskiwin and support the tourist requirements as well, it is suggested that other community initiatives and concerns be addressed. Some of these include, but may not be limited to, the following:

1.	Wetaskiwin golf course - expansion plans.
2.	Urban park program - development.
3.	Central business district - opportunities resulting from R.A.M. visitation.
4.	New municipal servicing to R.A.M. - maximization of service area.
5.	New urban growth - integration with recreational area, e.g. par-3 golf course.
6.	Other community initiatives - e.g. Highway 2A commercial area; old hospital site, recreational grounds on the east side and Peace Hills park.

WETASKIWIN GOLF COURSE

It is suggested that the golf facilities in Wetaskiwin consider expansion from the present 18 hole (5,760 m) facility. This option should be assessed with a full feasibility study. Items to be investigated include land area requirements and availability, design and features, club house facilities, rentals and market segmentation. If expanded, the Wetaskiwin Golf Course could still be supplemented by a par-3 golf course at another location, possibly near the museum (as noted above).

URBAN PARK PROGRAM

A significant land area exists on the west side of the City limits, between the airport and the golf course. This area includes a major drainage course that causes water ponding and stagnation through several parcels of land both within the present City boundary, and beyond it. Due to the topographical features of the area it has always been avoided by municipal servicing and land development. This area therefore offers superb potential for a well planned urban park with several natural amenities. A storm water management scheme and detailed land use planning would help create an outdoor recreation facility for the enjoyment of local residents as well as tourists.

Opportunities exist to link this new park area with the residential areas east of Highway 2A, the Museum site and the golf course to the north by an extensive community trail system.

CENTRAL BUSINESS DISTRICT

Several retail and service commercial opportunities will result with the increase in visitation to Wetaskiwin. The central commercial district presently provides Wetaskiwin and region with the bulk of services and products, all of which can be expanded or improved, to meet tourist demand. It is expected that downtown Wetaskiwin will continue to attract the pedestrian oriented consumer market. Therefore some of the exciting business opportunities that will exist range from theme restaurants to craft and souvenir shops, to speciality foods/deli shops. However, effective marketing and planning will be required by both the business community and the City to attract as many visitors as possible to the commercial areas.

NEW MUNICIPAL SERVICING

The proposed sanitary sewer and water servicing plan that will serve the R.A.M. is also expected to service several hundred hectares of land to the south and west of the City limits. Along with improvements to Highway 13 between Highway 2A and the museum site, the servicing capacity will create opportunities for new residential, commercial and industrial properties. The potential to develop various tourist services and accommodation appears unlimited. It is in the City's and developer's best interest to locate new development within the proposed servicing plan area. It is further recommended that the tourism services take advantage of lands with proposed servicing.

NEW URBAN GROWTH

As Wetaskiwin's population grows, the demand for residential lands will continue to increase. Prestigious neighbourhoods will equally be in demand. With proper planning, a residential neighbourhood, focusing on a higher end product, can be located near a prime attribute such as a golfing facility. This opportunity may be made available at the end of the south cluster where the recreational amenities of a par-3 golf course can be integrated with a residential lot subdivision.

OTHER COMMUNITY INITIATIVES

It is expected that the new developments in the vicinity of the museum should also complement some other community initiatives and facilities. For example, the highway commercial district along Highway 2A through Wetaskiwin will continue to serve as a prime location for auto oriented commercial ventures, including auto sales and services, R.V. repair, fast food and fixed-roof accommodation.

The location at Highway 2A and 50th Avenue can serve as a major focal point and access to downtown along 50th Avenue. The nearby old hospital site should also be considered for redevelopment along with the renovation and restoration of the existing housing stock along 50th Avenue leading into the business district.

The recreational grounds on the east side of the City presently serve many functions and uses. The site is used by local residents, adjacent schools and special event organizers. Several active sports are undertaken almost daily on the grounds.

Another important community initiative that is presently underway is the Peace Hills Park expansion and upgrading. This park is oriented to outdoor/nature interpretation utilizing the local flaura and fauna and other natural environment as its attraction.

IMPLEMENTATION

In order to proceed with scenario #4, it is recommended that the City of Wetaskiwin undertake some sound land use planning for the entire proposed development area. This area should include lands effected by the new servicing south of Highway 13 and extend as far north as the Peace Hills Nature Park and west to include the quarter sections just beyond the Museum site. Any private group should conduct its own feasibility assessment to support its own interests.

The following steps should be considered to assist with plans, concepts and detailed studies:

1. **Prepare an Area Structure Plan (ASP)**

   i) Assess proper approach with County of Wetaskiwin.
   ii) Delineate boundary of ASP area.
   iii) County and/or City to prepare terms of reference and set Steering Committee.
   iv) Assess annexation potential.
   v) Approach Battle River Regional Planning Commission for comments.
   vi) Select appropriate consultant or agency to prepare ASP.
   vii) See plan through to completion.
   viii) Adopt ASP per Provincial requirements.

2. **Prepare Urban Park Plan**
   i) Assess Provincial Urban Parks Program Guidelines.
   ii) Assess proper approach with County/Province.
   iii) Approach Battle River Regional Planning Commission for comments.
   iv) Establish Steering Committee or task force.
   v) Prepare terms of reference for plan study (storm water plan may be included in this study or as a separate assignment).
   vi) Select appropriate consultant or agency to undertake study.
   vii) See plan through to completion.
   viii) Review and assess plan options, recommendations and cost scenarios.
   x) Proceed with detailed plans and phased development.
   xi) Access funding sources.

3. **Prepare storm water management plan.**
   i) To be undertaken as part of the "Urban Park Plan" or as a separate assignment.
   ii) Accumulate all known area data.
   iii) Prepare terms of reference.
   iv) Select appropriate consultant or agency.
   v) Review and assess plan options.
   vi) Integrate with Urban Park design plans.

4. **Prepare Resort Development Concept(s)**

i) Select site area(s).

ii) Approach land owners.

iii) Prepare terms of reference.

iv) Select appropriate design consultant.

v) Review and assess concept.

vi) Proceed to feasibility stage on appropriate elements of concept if study not already conducted.

Although the above noted steps were presented for scenario number 4, much of the detailed planning would also be required for the other scenarios to succeed. Feasibility studies should also be conducted for various elements of the other scenarios.

FEASIBILITY STUDIES

It may be in the land owner's or developer's best interest to undertake feasibility studies in support of their intended plans. These studies should address such important items as:

- concept development
- market assessment
- financial assessment
- organizational assessment
- physical land use analysis
- servicing requirements
- marketing strategies
- economic impact

Studies may be required to access government funds and garner support, obtain private sector financing, obtain development approvals and to satisfy prospective investors or project participants.

It is recommended that feasibility studies be considered for the following initiatives:

1. Wetaskiwin Golf Course expansion
2. Resort/hotel development
3. R.V. campground development
4. Theme/amusement park development
5. Par-3 golf course development

It is suggested that the smaller initiatives may only require design plans and business plans in order to address both private and public sector concerns.

5.2.5 SUMMARY

For the benefits of the first scenario to be realized, the resort development should try to take advantage of the proposed new servicing infrastructure. To locate new development beyond the Reynolds-Alberta Museum site will require additional municipal expenditures if on-site servicing is not feasible. Nevertheless, this is a concentrated approach which could conceivably be undertaken by one entrepreneur or conglomorate that could be expected to bear a large share of the cost in keeping with capital investment. The second scenario will require sound planning, site investigation and marketing so that the impact of visitation can be strategically distributed throughout the business community. Option number three (or a variation of the same) is dependant on several entrepreneurs with different interests and possibly some civic investment. It lacks the concentrated effort of the resort approach but with proper support and encouragement, benefit could accrue to several organizations, businessmen, the city and county. The final option lends itself to many private and civic opportunities oriented towards clustering. Site areas should be maximized by appropriate land uses and availability of municipal services must be taken into consideration for each intended land use.

The above-noted scenario evaluation assumes a "full package" or high level development. This should not preclude a developer or entrepreneur from investigating opportunities at lesser scales of development. This could imply allowing for expansion or improvements to existing facilities and business operations or even downscaling proposed new developments. For example, a **mid or lower level approach** could suggest the following:

- **Accommodation: (fixed-roof)**
  - additions to existing hotels
  - improvement to quality of existing accommodation
  - rental cabin development near Wetaskiwin

- **Accommodation (Nonfixed-roof)**
  - improvements to local campgrounds
  - addition of r.v. camping stalls to existing campgrounds
  - expand Wetaskiwin campground

- **Food and Beverage Establishments**
  - improvements to existing facilities (ie. menus, service, seating capacity)
  - addition of one more fine dining establishment
  - addition of two more quality family dining facilities
  - food kiosks/vendors during peak periods

- **Conference/Meeting Facilities**
  - expansion of existing halls and/or restaurant meeting rooms

- **Recreation/Attractions**
  - increase of events and festivities in Wetaskiwin and region
  - improvements or expansion of wilderness and water oriented attractions
  - expansion of Wetaskiwin golf course and possible addition of par 3 golf in the area.

- **Tourist Services/Products**
  - improvement to retail sector through effective marketing and merchandising
  - add/expand lounges to existing dining facilities
  - add amusement and recreation facilities to existing campgrounds in region
  - enhance availability of all basic tourist services and products within existing business community.

Several possibilities and combinations exist with respect to location, type of facilities or operations, and the scale of development. The entrepreneur and developer must appreciate the impact of visitation on their particular areas of interest before they proceed. For example, visitor nights could peak during the months of May to September. Hotel operators should therefore realize that although their facilities may be in high demand for one season of the year, their occupancy rates could drop drastically during the shoulder periods or in winter, especially if there is no added visitor appeal to the area. Their business and marketing plans should reflect the seasonal variations.

5.3 ORGANIZATIONAL ASSESSMENT

It is noted that the three requirements to maximize and support tourism in Wetaskiwin and area are: accommodation, special retail and services and new attractions. Invariably, the private sector should be encouraged through any possible means to committee to investment and initiate development efforts in all of these areas, as required. The opportunities are best discerned by the entrepreneurs themselves, however, this fact should not preclude the City and other government interests to make the private sector aware of the anticipated tourist needs in the Wetaskiwin area.

Some initial steps that could be taken with respect to creating interest in the private sector are as follows:

1. Determine key potential participants for all areas of need.
2. Present market data now and as the museum becomes operational to entrepreneurs and key developers.
3. Investigate development of a similar nature and present findings to business community.
4. Have government fund feasibility studies for key proposals and initiatives in the region that will support the needs and interests of the visitors.
5. Assess which local organization is most suited to help market potential opportunities to the private sector.
6. Initiate a strategy (with clearly defined objectives) to monitor the supply and shortfalls of tourism requirements in Wetaskiwin and region on an on-going basis. This strategy should also include a means of disseminating the findings

to the private sector through the above-noted chosen organization. (i.e. Chamber of Commerce, Economic Development Board, or a special task force or standing committee).

7. Make public any important objectives in the locally - driven Community Tourism Action Plans and invite private sector consideration and involvement where appropriate.

It is advisable that if the City of Wetaskiwin or any surrounding municipalities wish to see new tourism attractions and support services developed, in the immediate future (prior to 1992), current local developers should be approached to assess options to their present plans. It is also imperative that the City (and surrounding municipalities) present all information on opportunities to the local merchants who may presently be contemplating expansion or improvements to their own businesses or considering new ventures.

With respect to the various tourism elements, the following steps should be considered to help initiate interest in development:

I Fixed-roof Accommodation

1. Approach existing local operators with known intent to expand.
2. Supply local operators with market information and a detailed list of needs to new accommodation.
3. Address and analyze concern with anticipated peak period versus shoulder period (seasonal fluctuations) demand for accommodation.
4. Consider any new proposals for fixed-roof accommodation and promote need for "attraction," "meeting" and "recreation" components.
5. Work with Battle River Regional Commission to investigate suitable site areas and requirements for hotels/motels and cabin developments.

II Nonfixed-roof Accommodation

1. Approach key organizations (such as APCORS) that could ultimately develop or be responsible for new camping facilities in the region.
2. Advise nearby Counties of need for improvements to their existing facilities.

3. Solicit government funding and approval to study areas of operation, improvements and expansion of present private camping facilities in the region.
4. Work with Alberta Recreation and Parks, Parks Division to investigate expansion or provision of full service campgrounds in vicinity of Wetaskiwin and near water bodies.
5. Promote development of a new full-service camping and r.v. facilities along with theme or amusement parks and other attractions in the region.
6. Investigate potential of expanding the present campground in Wetaskiwin.

III Food and Beverage/Dining

1. Approach existing operators with known intent to expand.
2. Promote need for quality family dining and fine dining establishments.
3. Work with Battle River Regional Planning Commission to investigate prime development areas and zoning requirements or changes.
4. Promote theme restaurants through use of decor, cuisine, building design, etc.
5. Promote opening of a night club in Wetaskiwin.

IV Conference/Meeting Facilities

1. Promote inclusion of meeting facilities to accommodate over 400 - 500 delegates/participants in any new hotel proposals.
2. Investigate potential of developing a new convention hall complex in downtown Wetaskiwin with special consideration to the old hospital site.

V Recreation/Attractions

1. Promote "theme-oriented" quality accommodation/resort facilities, i.e. golf, water park, amusements, etc.
2. Investigate opportunity to develop at least one other major tourism generator in the region.
3. Investigate "water oriented" recreational development opportunities on prime lakes in the region.

4. Support and encourage rural area recreational and accommodation developments in the form of bed and breakfast, guest ranches and vacation farms. Initiate a business/marketing advisory program for existing operators.
5. Target and promote shoulder periods and winter for enhanced events and festivities in Wetaskiwin and region.
6. Promote local events and festivities in keeping with tourism themes.

VI Tourist Services/Products

1. Present tourism needs to business community through Chambers of Commerce.
2. Encourage new businesses to locate in prime locations to attract visitor's attention.
3. Advise non-profit organizations of visitor's needs and support their interest to sell **local** products to tourists.
4. Promote new indoor and outdoor and amusement facilities in strategic locations.
5. Arrange for regular seminars, workshops and training sessions for full-time and seasonal staff in hospitality industry.
6. Meet with Battle River and David Thompson Tourism Zones to exchange ideas on tourism information services provided by them and communities in their zones.
7. Contact all regional Community Tourism Action Plan Committees and describe anticipated tourism needs and voids.
8. Create a BRZ in downtown Wetaskiwin.

Various items of encouragement for development should be considered by the City of Wetaskiwin (and surrounding municipalities). Some of these include, but are note limited to the following:

- **Municipal tax breaks**
- **Land servicing assistance**
- **Landscaping assistance**
- **Rezoning**

None of these forms of assistance to the private sector, however, should preclude the municipality from considering other options that a developer may have in mind.

The City of Wetaskiwin recognizes that anticipated visitation of R.A.M. will present opportunities as well as challenges for their community. In order to help them deal with the impact, the City commissioned IMC Consulting Group Inc. to undertake the "Reynolds-Alberta Museum Economic and Market Impact Assessment." This study takes a very detailed look at the anticipated market segmentation and at Wetaskiwin's ability to service that market. This additional study will also recommend a tourism theme for the City, a marketing strategy, community improvements and how the existing businesses and various organizations can take advantage of the expected visitation.

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Town of Millet, "Community Tourism Action Plan - Draft", May, 1988.

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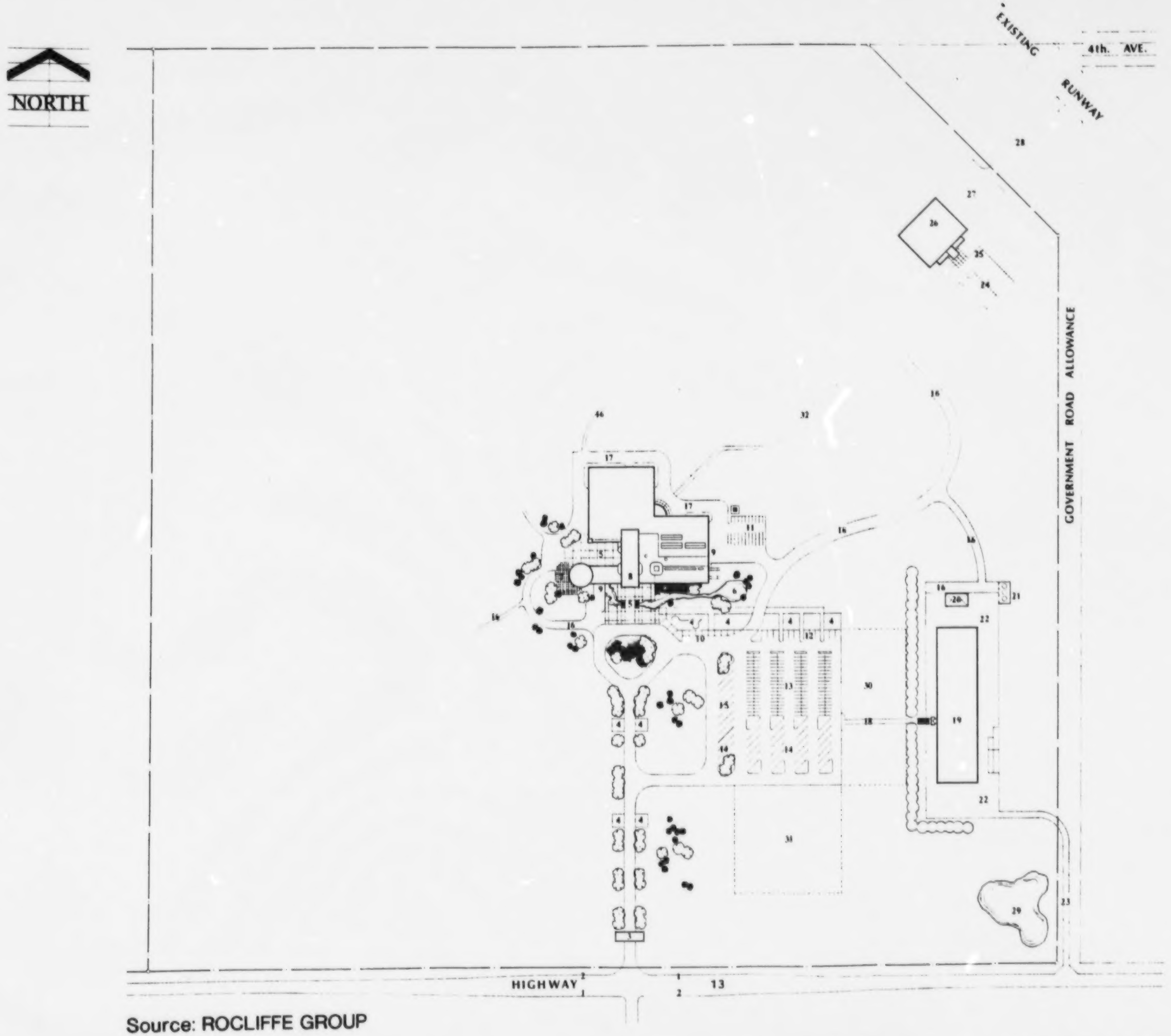
Contacts

o Personal meetings and conversations were held with several local and provincial government officials as well as tourism officials. Some of these include the following:

  - City of Wetaskiwin CTAP - "Theme Committee"
  - City of Wetaskiwin - Administration
  - City of Wetaskiwin - Engineering
  - City of Wetaskiwin - Recreation and Culture
  - County of Wetaskiwin - Administration
  - County of Camrose - Administration
  - Wetaskiwin and District Chamber of Commerce Staff
  - Alberta Recreation and Parks, Parks Division; Planning and Research Staff
  - Battle River Tourist Zone Staff
  - David Thompson Tourist Zone Staff
  - Wetaskiwin Golf and Country Club Staff
  - Alberta Culture - Dr. Frank Milligan, Mr. Mark Rasmussen
  - Alberta Economic Development and Trade - Mr. Al Walkey, Camrose Small Business Region Office
  - Alberta Private Campground Owners Recreation Society (APCORS); Personal Discussions with Representatives.

APPENDIX 1

IMC
Consulting
Group Inc.


NORTH
EXISTING RUNWAY
4th. AVE.
GOVERNMENT ROAD ALLOWANCE
HIGHWAY 13
1
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11
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30
31
32
0 25 50 75 100m

1 Deceleration Zone
2 Acceleration Zone
3 Entrance Gate
4 Display Pad
5 Plaza
6 Dry Pond
7 Patio
8 Main Museum Building
9 Service Entrance
10 Bus Loading/Unloading
11 Staff Parking (30 Stalls)
12 Disabled Parking (12 Stalls)
13 Paved Parking (152 Stalls)
14 Paved R.V. Parking (23 Stalls)
15 Paved Bus Parking (8 Stalls)
16 Gravel Paved Driveway/ Walkway
17 Access Apron
18 Walkway To Viewing Platform
19 Existing Storage Building
20 Service Building
21 Fuel Tanks
22 Existing Gravel Paving
23 Existing Access Road
24 Gravel Parking (30 Stalls)
25 Gravel Disabled Parking (3 Stalls)
26 Hangar
27 Paved Display Apron
28 Paved Taxiway
29 Storm Water Retention Pond
30 Overflow Parking
31 Future Parking
32 Paved Walkway

Source: ROCLIFFE GROUP

SITE PLAN

APPENDIX 2

Average Annual Daily and Average Summer Daily Traffic Volumes for Selected Routes

(1987)

Highway	AADT	ASDT
Highway 2		
2 Km S 2/2A Leduc	12,840	14,840
.5 Km S 2/39 Leduc	16,060	18,040
5.9 Km N 2/19 Nisku	34,580	36,780
S of 13 W of Wetaskiwin (86)	12,970	14,680
1.4 Km N 2/53 Ponoka	12,350	14,270
S of 597 W of Blackfalds	13,980	15,660
N of 11 at Red Deer	13,580	15,140
Highway 2A		
5.8 Km S 2/2A Lacombe	4,400	4,610
S of 611 N of Hobbema	4,830	5,080
3.5 Km S 2A/13 Wetaskiwin	5,050	5,310
S of 13 N of Wetaskiwin	6,830	7,200
N of 13 N of Wetaskiwin	5,800	6,120
6 Km N 2A/13 Wetaskiwin	5,740	6,050
3.7 Km S 2/2A Leduc	5,370	5,660
Highway 13		
5.5 Km E 13/26 Camrose	3,840	4,110
3.7 Km E 13/21 Camrose	7,290	7,990
E of 21 W of Camrose	6,910	7,570
W of 21 W of Camrose	2,700	3,030
10 Km E 2A/13 Wetaskiwin	3,030	3,330
E of 2 W of Wetaskiwin (86)	2,330	2,580
3.5 Km W 2/13 Falun	2,460	2,740
3.6 Km E 12/13 Winfield	490	540
Highway 21		
3 Km S 14/21	5,150	5,670
6 Km N 13/21	3,700	4,070
N of 13 W of Camrose	3,790	4,180
S of 13 W of Camrose	1,890	2,080
2.6 Km S 21/53 Bashaw	1,220	1,340
Highway 12 (20)		
Winfield (N 12/13)	1,220	1,370
Rimbey (N 12/53)	2,960	3,280
Lacombe (W 2/12)	2,880	3,250
Stettler (W 12/56)	3,660	4,060

Highway 11

W of 2 Red Deer	9,440	9,670
E of 20 SE Sylvan Lake	5,520	5,640
E of 22 N Rocky Mountain House	2,940	3,630

Highway 56

1.9 Km N 9/27/56 Morrin	720	830
N 56/594 Stettler	1,400	1,550
5.6 Km N 12/56 Stettler	1,740	1,920
S 13/56	950	1,020

APPENDIX 3

Population and Location of Selected Regional Service Centres (1986)

Prime Service Centres	**Population**	**Location**
Wetaskiwin	10,103	Hwy. 2A/13
Camrose	12,751	Hwy. 13 (east of Wetaskiwin)
Ponoka	5,476	Hwy. 2A (south of Wetaskiwin)
Leduc	13,213	Hwy. 2/2A (north of Wetaskiwin)
Millet	1,428	Hwy. 2A (just north of Wetaskiwin)
Red Deer	54,192	Hwy. 2
Edmonton	571,506	Hwy. 2/16
Other Regional and Local Centres		
Devon	3,931	Hwy. 60/19 (west of Hwy. 2)
Rimbey	2,106	Hwy. 53 (west of Ponoka)
Tofield	1,560	Hwy. 14 (east of Sherwood Park)
Lacombe	6,033	Hwy. 12/2A (north of Red Deer)
Calmar	1,130	Hwy. 39 (east of Leduc)
Hay Lakes	318	Hwy. 21/Sec. 617 (north of Camrose)
Stettler	5,136	Hwy. 12/56 (northeast of Red Deer)
Sylvan Lake	3,779	Hwy. 11 (east of Red Deer)
Thorsby	737	Hwy. 39/Sec. 778 (east of Calmar)
Beaumont	3,923	Hwy. 21 (east of Leduc)
Bashaw	875	Hwy. 21 (east of Ponoka)
New Norway	276	Hwy. 21 (south of Camrose)
Drayton Valley	4,982	Hwy. 22
Rocky Mountain House	5,261	Hwy. 22/11

APPENDIX 4

Business Categories (by SIC) of Relevance to the Tourist Trade

- Watch and Jewellery Repair (includes engraving)
- Camera and Photographic Supply
- Toy and Hobby Stores
- Gift, Novelty and Souvenir
- Second Hand and Collectable (Antiques)
- Physiotherapists
- Optometrists
- Denturists
- Other Health Practioners (other than physicians)
- Medical Labs
- Caterers
- Taverns and Night Clubs
- Motion Picture Theatres
- Entertainment Production Companies and Artists
- Golf Courses
- Curling Clubs
- Skiing Facilities
- Sports and Recreation (other) clubs
- Gambling Operations
- Bowling Alleys and Billiards
- Amusement Parks
- Dance Halls, Studios and Schools
- Other Amusement and Recreation
- Barber and Beauty Shop
- Laundries and Dry Cleaners
- Shoe Repair
- Other Personal
- Machinery Equipment: Repair and Rental (leasing)
- Audio Visual/Video Stores
- Auto/Truck Rental (leasing)
- Photographers
- Welding (service and materials)]
- Other repair (locksmithing, etc.)
- Janitorial
- Ticket and Travel Agencies
- Sports Shops
- R.V. Service

APPENDIX 5

REYNOLDS MUSEUM SERVICING
TABLE I
ECONOMIC COMPARISON OF SANITARY SERVICING ALTERNATIVES

Alternatives	Capital Cost	Additional Serviceable Area Hectares (acres)	Cost per Serviceable Hectare (acre)	Total System(4) Cost	Total System Cost per Serviceable Hectare (acres)
Alternative 1 Lift Station on 47 Avenue	$2,715,000	130 (325)	$20,885 (8,354)	$4,721,000	$36,315 (14,526)
Alternative 2 Lift Station on 47 Avenue	3,030,000	355 (875)	8,535 (3,463)	5,036,000	$14,186 (5,755)
Alternative 3 Gravity Sewer to West End	3,260,000	355 (875)	9,183 (3,725)	5,266,000	14,833 (6,018)
Alternative 4 South Trunk to New Lagoons	8,319,000(1)	695 (1,720)	11,970 (4,837)	9,619,000	13,840 (5,592)
Alternative 5 South Trunk with Force Main to Existing Lagoons	4,003,000(2)	695 (1,720)	5,760 (2,327)	5,303,000	7,630 (3,083)
Alternative 6 South Trunk with Gravity Main to Existing Lagoon	4,344,000(3)	695 (1,720)	6,250 (2,526)	5,644,000	8,121 (3,281)
Alternative 7 Relocate Existing Lagoons	10,619,000	695 (1,720)	15,279 (6,174)	11,919,000	17,150 (6,930)

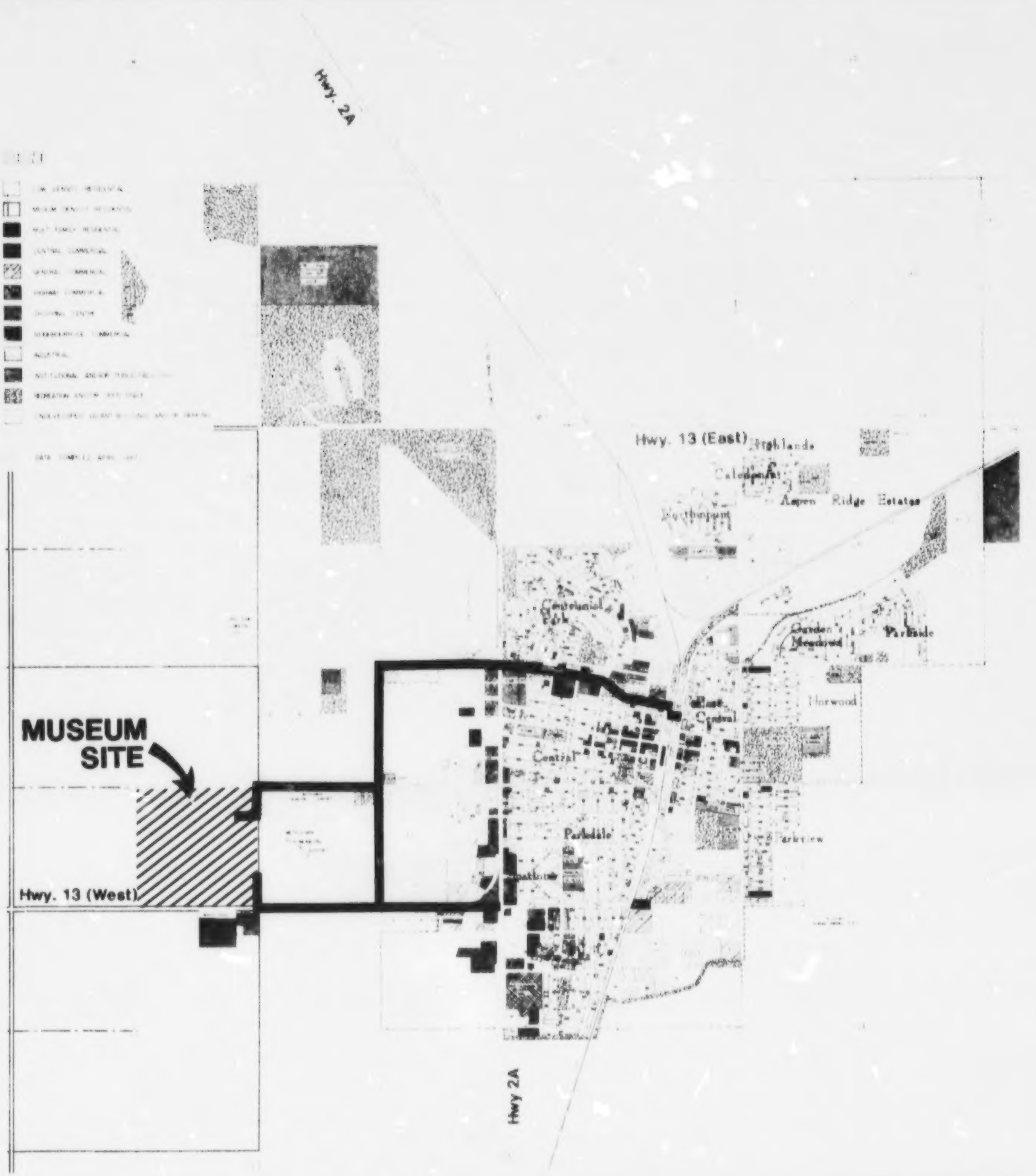
(1) Includes land purchase

(2) Lift Station and Force Main Staged to handle only 1/2 of ultimate flow Cost of upgrading existing lagoons are not included.

(3) Cost of upgrading existing lagoons not included.

(4) Includes upgrading required on the opposite route.

APPENDIX 6

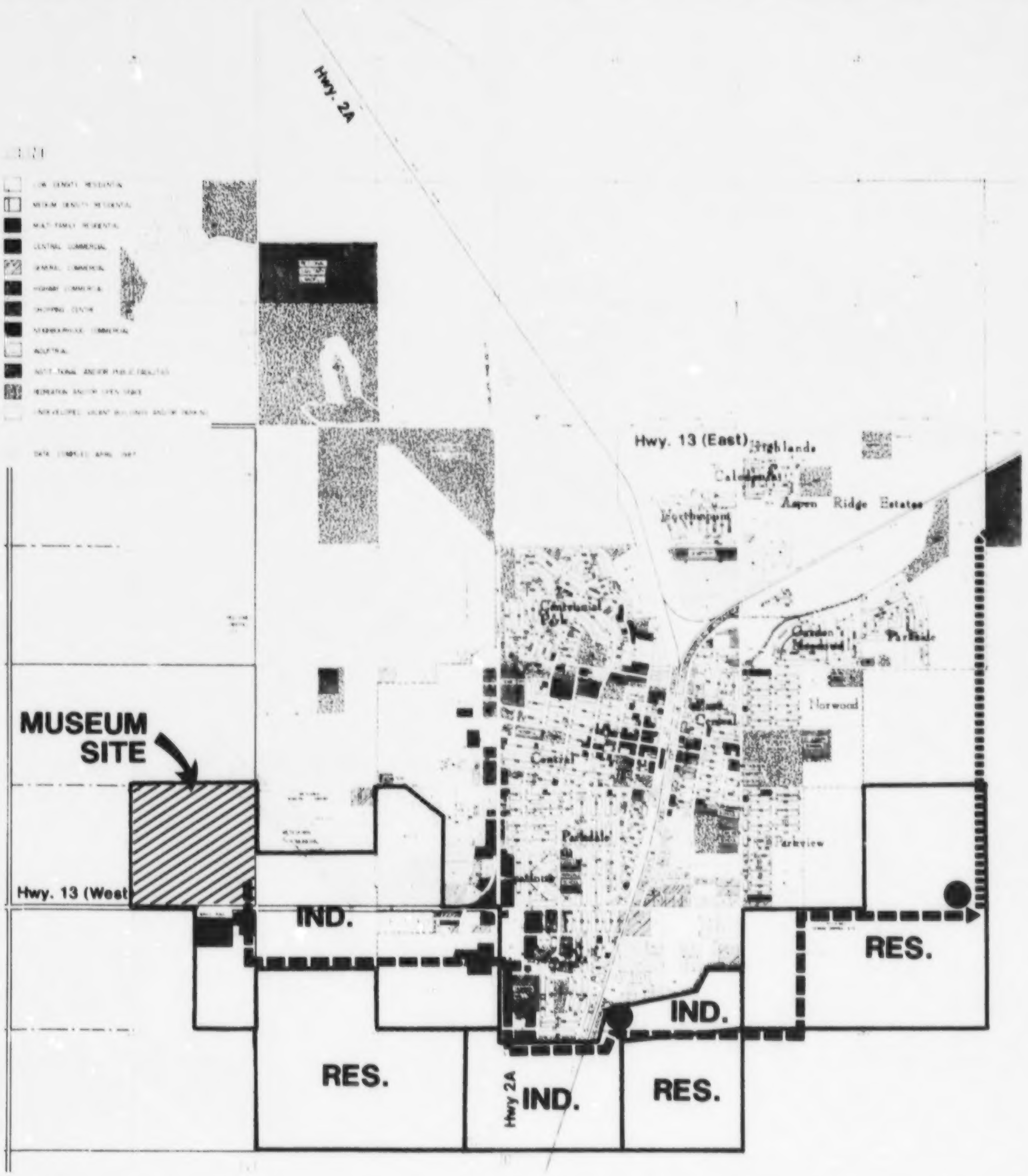

Hwy. 2A
Hwy. 13 (East)
Highlands
Aspen Ridge Estates
Centennial Park
Garden Meadows
Parkside
Norwood
Central
Parkdale
Parkview
MUSEUM SITE
Hwy. 13 (West)
Hwy 2A

Source: INFRASTRUCTURE SYSTEMS LTD.

IMC
Consulting
Group Inc.

▬ PROPOSED WATERMAIN

PROPOSED WATER SERVICING PLAN


Hwy. 2A
Hwy. 13 (East)
Highlands
Caledonia
Aspen Ridge Estates
Northwood
Centennial Park
Garden Meadows
Parkside
Norwood
Central
Parkdale
Parkview
MUSEUM SITE
Hwy. 13 (West)
IND.
RES.
IND.
RES.
Hwy 2A
IND.
RES.

IMC
Consulting
Group Inc.

▬ ▬ ▬ Proposed Sewermain
▪▪▪▪▪ Proposed Forcemain
● Proposed Lift Station
RES. Future Residential Service Area
IND. Future Industrial Service Area

Source: INFRASTRUCTURE SYSTEMS LTD.

PROPOSED SANITARY SERVICING PLAN

APPENDIX 7

SECTION 42 DISTRICT REGULATIONS

C.1 Downtown Commercial District

42.0 Purpose: To establish a central business district in which land is used for pedestrian-oriented commercial service and retail development which does not require large tracts of land for efficient operation. In addition this district will accommodate traditional civic development which functions as a central focus of the downtown.

42.1 Permitted Uses

(1) retail stores
(2) professional financial and office support services
(3) business support services
(4) personal service businesses
(5) eating establishments
(6) public and quasi-public buildings
(7) commercial schools
(8) health services
(9) hotels

Discretionary Uses

(1) theatres
(2) indoor participant recreation services
(3) physical fitness and recreation centres
(4) motels and motor hotels
(5) private clubs and lodges
(6) child care facilities
(7) group care facilities
(8) bakeries
(9) transportation depots
(10) lounges, pubs and beverage rooms
(11) drive-in services
(12) animal grooming business, pet shops
(13) funeral services
(14) public utility uses and installations
(15) shopping plazas/centres
(16) religious assemblies
(17) warehousing (providing most of the floor space is used in a retail fashion)
(18) residential dwelling units (providing the units are an integral part of the main commercial land use)
(19) buildings and uses accessory to the above
(20) land uses similar in nature to the above as determined by the Development Officer

42.2 Minimum Lot Width

7m (23.0 feet)

42.3 Minimum Lot Area

280m^2 (3014.0 square feet)

42.4 Maximum Lot Coverage

90% for principal and accessory buildings, providing parking requirements are met.

42.5 Minimum Front Yard Setback

None required

42.6 Minimum Side Yard Setback

None required

42.7 Minimum Rear Yard Setback

3m (9.8 feet)

42.8 Maximum Building Height

13.5m (44.3 feet) or such greater height as approved by the Development Officer or Building Inspector.

42.9 Parking and Loading

As regulated under Section 92 of this Bylaw.

42.10 Lanes

Each lot shall have access to a lane at one side or the rear.

42.11 Signs

As regulated under Section 91 of this Bylaw.

42.12 Landscaping and Screening

To the satisfaction of the Development Officer.

42.13 Development Regulations for Specific Uses

Regulations pertaining to specific uses are as follows:

(a) child care facilities - Section 86.
(b) group care facilities - Section 85.
(c) drive-in services and vehicular-oriented uses - Section 81.
(d) animal grooming businesses, pet shops - Section 84.
(e) religious assemblies - Section 80.
(f) utility installations - to the satisfaction of the Development Officer regarding aspects of safety and building aesthetics.

42.14 Shopping Centres

Shopping centres shall be permitted only on lots or sites approved by the Development Officer and the design, siting (including yards and setbacks), external finish, appearance and landscaping shall be to the satisfaction of the Development Officer.

42.15 General Regulations

The General Regulations contained in **PART EIGHT** apply to any development on any lot. Please check there regulations as they will apply when and where necessary.

SECTION 43 DISTRICT REGULATIONS

C.2 General Commercial District

43.0 Purpose: To establish a district in which land is used for retail development which requires larger than normal tracts of land for efficient operation.

43.1 Permitted Uses

(1) newspaper and printing shops
(2) caterers
(3) auctioneering establishments
(4) service stations
(5) transportation depots
(6) indoor participant recreation services
(7) physical fitness centres
(8) auto dealers and showrooms
(9) furniture warehouse and accessory retail sales
(10) home furnishing, appliance and accessory retail sales and service
(11) home improvement centres and building supplies, lumber and/or hardware centres
(12) wholesale establishments
(13) animal grooming businesses, pet shops

Discretionary Uses

(1) public and quasi-public buildings
(2) private clubs and lodges
(3) public utility uses and installations
(4) funeral services
(5) commercial schools
(6) restaurants/eating and drinking establishments
(7) health services
(8) professional financial and office support services
(9) business support services
(10) hotels and motor hotels
(11) child care facilities
(12) group care facilities
(13) contractor services
(14) trade workshops
(15) warehouses (providing most of the floor space is used in a retail fashion)
(16) residential dwellings units (providing the units are an integral part of the main commercial land use)
(17) auto and auto-related service, rental, parts, supplies, repair and related businesses
(18) drive-in services
(19) recreational vehicle dealerships, service, rental, parts, supplies, repair and related businesses
(20) equipment and machinery sales, service, rental, parts, supplies and repairs
(21) buildings and uses accessory to the above

43.2 Minimum Lot Width

Auto sales and service station - 25m (82.0 feet)
All other uses - 15m (49.2 feet) or as determined by the Development

Officer

43.3 Minimum Lot Area

Service station - 750m^2 (8073.2 square feet)
Combined service station and car wash - 1120m^2 (12056.0 square feet)
All other uses - 560m^2 (6028.0 square feet) or as determined by the Development Officer

43.4 Maximum Lot Coverage

70% for principal and accessory buildings

43.5 Minimum Front Yard Setback

Service station - 12m (39.4 feet)
All other uses - none required

43.6 Minimum Side Yard Setback

Service station - 5m (16.4 feet)
All other uses:
- internal lot - none required
- corner lot where abutting a land or roadway - 3m (9.8 feet)

43.7 Minimum Rear Yard Setback

6m (19.7 feet)

43.8 Maximum Building Height

13.5m (44.3 feet)

43.9 Parking and Loading

As regulated under Section 92 of this Bylaw.

43.10 Lanes

Each lot shall have access to a lane.

43.11 Signs

As regulated under Section 91 of this Bylaw.

43.12 Development Regulations for Specific Uses

Regulations pertaining to specific uses are as follows:

(a) child care facilities - Section 86.
(b) group care facilities - Section 85.
(c) drive-in services and vehicular-oriented uses - Section 81.
(d) animal grooming businesses, pet shops - Section 84.
(e) religious assemblies - Section 80.

(f) utility installations - to the satisfaction of the Development Officer regarding aspects of safety and building aesthetics.

43.13 Appearance and Siting Requirements

(a) Prior to issuance of a development permit, a site plan indicating location, height and external finish, including accessory buildings, landscaping, parking accesses and driveways, proposed lighting and signs, and any fences or screening shall be submitted to, and approved by, the Development Officer. A site plan shall include provisions for setbacks for parking lots and buildings shall be in harmony with adjacent developments whenever possible, to the satisfaction of the Development Officer.

(b) All portions of a lot, except those used for buildings, structures, parking, loading/unloading, driveways, outdoor storage and display purposes, shall be landscaped to the satisfaction of the Development Officer.

(c) The entire lot and all buildings shall be maintained in a neat and tidy manner, including the trim and upkeep of landscaped areas and the removal of debris and unsightly objects.

(d) All storage, freight or truck yards shall be enclosed or completely screened by buildings, trees, landscaped features or fences, or a combination thereof, to provide effective screening from the ground to a height of 2 metres (6.6 feet).

43.14 General Regulations

The General Regulations contained in PART EIGHT apply to any development on any lot. Please check these regulations as they will apply when and where necessary.

SECTION 44 DISTRICT REGULATIONS

C.3 Highway Commercial District

44.0 Purpose: To establish a district in which land is used for development which serves the motoring public.

44.1 Permitted Uses

(1) auto dealerships and showrooms
(2) auto and auto-related service, rental, parts, supplies, repair and related businesses
(3) recreational vehicle dealerships, service, rental, parts, supplies, repair and related businesses
(4) equipment and machinery sales, service, rental, parts, supplies and repair
(5) car wash
(6) transportation depot
(7) travel bureaus, tourist information centres
(8) motels and motor hotels
(9) restaurants/eating and drinking establishments
(10) service stations
(11) convenience stores

Discretionary Uses

(1) any use to serve tourists or the travelling public that depends on its proximity to the highway for trade
(2) indoor participant recreation services
(3) bulk oil and gas distributors
(4) drive-in services
(5) public utility uses and installations
(6) shopping plazas
(7) land uses which are similar in nature to the above uses as determined by the Development Officer
(8) land uses which are incidental to a permitted use or approved discretionary use, occupying a subordinate location (i.e. above or below the first storey, a small portion of the total development), and which, in the opinion of the Development Officer, will not adversely affect or interfere with the intent of this District.

44.2 Minimum Lot Width

Auto sales and service station - 25m (82.0 feet)
All other uses - 15m (49.2 feet) or as determined by the Development Officer

44.3 Minimum Lot Area

Service station - 750m^2 (8073.2 square feet)
Combined service station and car wash - 1120m^2 (12056.0 square feet)
All other uses - 560m^2 (6028.0 square feet) or as determined by the Development Officer

44.4 Maximum Lot Coverage

40% for principal and accessory buildings

44.5 Minimum Front Yard Setback

Service station - 12m (39.4 feet)
All other uses - 10m (32.8 feet)

44.6 Minimum Side Yard Setback

3m (9.8 feet) or as defined by the limiting distance required in the Alberta Building Code

44.7 Minimum Rear Yard Setback

6m (19.7 feet)

44.8 Maximum Building Height

13.5m (44.3 feet)

44.9 Parking and Loading

As regulated under Section 92 of this Bylaw.

44.10 Lanes

Each lot shall have access to a lane.

44.11 Signs

As regulated under Section 91 of this Bylaw.

44.12 Development Regulations for Specific Uses

Regulations pertaining to specific uses are as follows:

(a) drive-in services and vehicular-oriented uses - Section 81.
(b) utility installations - to the satisfaction of the Development Officer regarding aspects of safety and building aesthetics.

44.13 Appearance and Siting Requirements

(a) Prior to issuance of a development permit, a site plan indicating location, height and external finish, including accessory buildings, landscaping, parking accesses and driveways, proposed lighting and signs, and any fences or screening shall be submitted to, and approved by, the Development Officer. A site plan shall include provisions for setbacks for parking lots and buildings shall be in harmony with adjacent developments whenever possible, to the satisfaction of the Development Officer.

(b) All portions of a lot, except those used for buildings, structures, parking, loading/unloading, driveways, outdoor storage and display purposes, shall be landscaped to the satisfaction of the Development Officer.

(c) The entire lot and all buildings shall be maintained in a neat and tidy manner, including the trim and upkeep of landscaped areas and the removal of debris and unsightly objects.

(d) All storage, freight or truck yards shall be enclosed or completely screened by buildings, trees, landscaped features or fences, or a combination thereof, to provide effective screening from the ground to a height of 2 metres (6.6 feet).

44.14 General Regulations

The General Regulations contained in PART EIGHT apply to any development on any lot. Please check these regulations as they will apply when and where necessary.

SECTION 45 DISTRICT REGULATIONS

C.3A Retail Highway Commercial

45.0 Purpose: To allow as a predominant land use highway commercial development which maximizes the highway exposure and serves the motoring public. In addition, this district will allow other forms of retail uses in a controlled manner.

45.1 Permitted Uses

(1) auto dealerships and showrooms
(2) auto and auto-related service, rental, parts, supplies, repair and related businesses
(3) recreational vehicle dealerships, service, rental, parts, supplies, repair and related businesses
(4) equipment and machinery sales, service, rental, parts, supplies and repair
(5) car wash
(6) transportation depot
(7) travel bureaus, tourist information centres
(8) motels and motor hotels
(9) restaurants/eating and drinking establishments
(10) service stations
(11) convenience stores

Discretionary Uses

(1) any use to serve tourists or the travelling public that depends on its proximity to the highway for trade
(2) indoor participant recreation services
(3) bulk oil and gas distributors
(4) drive-in services
(5) public utility uses and installations
(6) shopping plazas
(7) retail stores
(8) physical fitness and recreation centres

45.2 Minimum Lot Width

Auto sales and service station - 25m (82.0 feet)
All other uses - 15m (49.2 feet) or as determined by the Development Officer

45.3 Minimum Lot Area

Service station - 750m^2 (8073.2 square feet)
Combined service station and car wash - 1120m^2 (12056.0 square feet)
All other uses - 560m^2 (6028.0 square feet) or as determined by the Development Officer

45.4 Maximum Lot Coverage

40% for principal and accessory buildings

45.5 Minimum Front Yard Setback

Service station - 12m (39.4 feet)
All other uses - 10m (32.8 feet)

45.6 Minimum Side Yard Setback

3m (9.8 feet) or as defined by the limiting distance required in the Alberta Building Code

45.7 Minimum Rear Yard Setback

6m (19.7 feet)

45.8 Maximum Building Height

13.5m (44.3 feet)

45.9 Parking and Loading

As regulated under Section 92 of this Bylaw.

45.10 Lanes

Each lot shall have access to a lane.

45.11 Signs

As regulated under Section 91 of this Bylaw.

45.12 Development Regulations for Specific Uses

Regulations pertaining to specific uses are as follows:

(a) drive-in services and vehicular-oriented uses - Section 81.
(b) utility installations - to the satisfaction of the Development Officer regarding aspects of safety and building aesthetics.

45.13 Appearance and Siting Requirements

(a) Prior to issuance of a development permit, a site plan indicating location, height and external finish, including accessory buildings, landscaping, parking accesses and driveways, proposed lighting and signs, and any fences or screening shall be submitted to, and approved by, the Development Officer. A site plan shall include provisions for setbacks for parking lots and buildings shall be in harmony with adjacent developments whenever possible, to the satisfaction of the Development Officer.

(b) All portions of a lot, except those used for buildings, structures, parking, loading/unloading, driveways, outdoor storage and display purposes, shall be landscaped to the satisfaction of the Development Officer.

(c) The entire lot and all buildings shall be maintained in a neat and tidy manner, including the trim and upkeep of landscaped areas and the removal of debris and unsightly objects.

(d) All storage, freight or truck yards shall be enclosed or completely screened by buildings, trees, landscaped features or fences, or a combination thereof, to provide effective screening from the ground to a height of 2 metres (6.6 feet).

45.14 General Regulations

The General Regulations contained in PART EIGHT apply to any development on any lot. Please check these regulations as they will apply when and where necessary.

SECTION 46 DISTRICT REGULATIONS

C.4 Neighbourhood Commercial District

46.0 Purpose: To establish a district in which land is used for local retail and service outlet development which provide for the sale of convenience goods and services in close proximity to residential areas.

46.1 Permitted Uses

(1) convenience stores

Discretionary Uses

(1) all other retail stores
(2) personal service businesses
(3) gas bars
(4) dwelling units (providing that the dwelling units form an integral part of the main neighbourhood commercial land use)

46.2 Minimum Lot Width

15m (49.2 feet)

46.3 Minimum Lot Area

Gas bars - 750m^2 (8073.2 square feet)
All other uses - 560^2 (6028.0 square feet)

46.4 Maximum Lot Coverage

40% for principal and accessory buildings

46.5 Minimum Front Yard Setback

12m (39.4 feet)

46.6 Minimum Side Yard Setback

3m (9.8 feet), or as defined by the limiting distance required in the Alberta Building Code

46.7 Minimum Rear Yard Setback

6m (19.7 feet)

46.8 Maximum Building Height

13.5m (44.3 feet)

46.9 Parking and Loading

As regulated under Section 92 of this Bylaw.

46.10 Lanes

Each lot shall have access to a lane.

46.11 Signs

As regulated under Section 91 of this Bylaw.

46.12 Appearance and Siting Requirements

(a) Lots to be used for the establishment of convenience stores shall be located on at least one major street and outside a radius of 1 kilometre (0.6 miles) from any existing similar facility or lot approved for such a use.

(b) The siting and appearance of all buildings or improvements, and the landscaping of the lot shall be to the satisfaction of the Development Officer in order that there shall be general conformity with adjacent buildings, and that there may be adequate protection afforded to the amenities of the adjacent buildings.

46.13 General Regulations

The General Regulations contained in PART EIGHT apply to any development on any lot. Please check these regulations as they will apply when and where necessary.

SECTION 47 DISTRICT REGULATIONS

C.5 Shopping Centre Commercial District

47.0 Purpose: To establish a district in which land is used for shopping centre development which is intended to serve a community or regional trade area.

47.1

Permitted Uses	Discretionary Uses
(1) shopping malls	(1) gas bar
(2) shopping plazas	(2) drive-in services
	(3) carnivals
	(4) public utility uses and installations

47.2 Minimum Lot Area

4 hectares (9.9 acres)

47.3 Maximum Lot Coverage

40% for principal and accessory buildings

47.4 Minimum Front Yard Setback

12m (39.4 feet)

47.5 Minimum Side Yard Setback

12m (39.4 feet)

47.6 Minimum Rear Yard Setback

12m (39.4 feet)

47.7 Maximum Building Height

13.5m (44.3 feet)

47.8 Parking and Loading

As regulated under Section 92 of this Bylaw.

47.9 Signs

As regulated under Section 91 of this Bylaw.

47.10 Development Regulations for Specific Uses

Regulations pertaining to specific uses are as follows:

(a) drive-in services and vehicular-oriented uses - Section 81.
(b) utility installations - to the satisfaction of the Development

Officer regarding aspects of safety and building aesthetics.

47.11 Appearance and Siting Requirements

(a) The siting and appearance of all buildings or improvements, and the landscaping of the site shall be to the satisfaction of the Development Officer in order that there shall be general conformity with adjacent buildings.

(b) No parking, loading, storage, trash collection, outdoor service or display area shall be permitted within a required yard. Loading, storage, and trash collection areas shall be located at the rear or sides of the principal building and shall be screened from view from any adjacent sites or public roadways. If the rear or sides of a site area used for parking, an outdoor service or display area, or both, abut a residential district or a lane serving a residential district, the parking area shall be screened to the satisfaction of the Development Officer.

47.12 General Regulations

The General Regulations contained in PART EIGHT apply to any development on any lot. Please check these regulations as they will apply when and where necessary.